DOCUSIGN USERS MANUAL

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DocuSign Overview

DocuSign is the leading eSignature solution in the market, allowing easy, efficient, and secure signing of electronic documents. Accessible anytime, anywhere, on any device, businesses of all sizes and industries are replacing manual, paper-based signature methods with DocuSign's electronic signatures.

The benefits are clear – no more paper documents to mail and route manually, quicker signatures by all parties, a clear audit trail, improved visibility and control, and reduced costs.

As The Global Standard for eSignature®, DocuSign offers the easiest, fastest, most secure way to send, sign, track, and store documents in the cloud.

The DocuSign website at www.docusign.com has a great deal of information, FAQs, whitepapers, videos, etc. that explain the entire e-sign infrastructure and the particular DocuSign how-to's. To learn more about the Docusign solution itself, start here: https://www.docusign.com/faq.

You will need to set up an account at DocuSign before configuring the Agiloft interface. To use the Agiloft-DocuSign integration, you will need an Enterprise account that is transaction-based. For more information, visit the DocuSign Products and Pricing page.

Agiloft Certification by DocuSign

Agiloft has completed an extensive certification process by DocuSign to verify that the Agiloft API (Application Programming Interface) is compliant with all DocuSign and e-signing standards requirements. To find out more about the DocuSign certification process click here.

Agiloft Interface to DocuSign

Agiloft provides embedded integration with DocuSign, and this document will explain how to set up and use that interface to send and e-sign your important electronic documents, all from within your Agiloft KnowledgeBase. Note that notification emails are sent to signers by DocuSign and that all actual e-signing is performed in the cloud through the DocuSign website.

This document will assume that the reader has some familiarity with much of the Agiloft functionality, and especially that relating to Contract Management and the use of document print templates and metadata tags.

The Agiloft interface is intended to be as self-sufficient as possible, in that the Agiloft customer can perform all their e-signing functionality from within their Agiloft KnowledgeBase without ever having to go to the DocuSign website other than to e-sign documents.

However, the DocuSign website does have additional functionality and some users may need to perform some operations at DocuSign, depending on their business requirements. The main action that may need to be done at DocuSign is adding the special DocuSign signature tags to the document before sending it. This can be avoided for documents created from standard print templates in Agiloft or from your standard company print templates preconfigured with the DocuSign tags. But for documents provided by 3rd parties that cannot be easily modified, it will generally be easiest to add the tags through the drag-and-drop interface available at DocuSign.

See a later section in this manual, "Additional Functionality at DocuSign" on page 65 for more details about other functionality available at the DocuSign website.

DEFINITIONS

DocuSign API:

Agiloft Application Programming Interface that enables customers to e-sign and manage electronic documents within their KnowledgeBase.

DocuSign Account Administrator:

The "owner" of the company's DocuSign account. The Administrator can add DocuSign users, assign permissions, and perform many other functions on the DocuSign website.

DocuSign Sender/User:

Someone who is authorized to send out documents for e-signing. The user will have an entry in the company account on the DocuSign website.

DocuSign Signer/Recipient:

Someone who receives an email request to e-sign a document. The signer is not required to have a DocuSign account or have an entry in the company account on the DocuSign website.

DocuSign Websites:

https://www.docusign.com – main company website
https://www.docusign.net – Administrator sets up DocuSign configuration parameters here

Envelope:

A container for electronic documents being e-signed. An envelope can contain multiple documents, each with multiple pages, for e-signing by one or more people.

E-Signature:

An electronic signature, or eSignature, as defined by the Federal ESIGN Act , is an "electronic sound, symbol or process, attached to or logically associated with a contract or other record and executed or adopted by a person with the intent to sign the record" (ESIGN). All 50 states have laws that define electronic signatures in substantially the same way. Learn more

DocuSign electronic signatures are:

Legal – DocuSign is the only eSignature company that is ISO 27001 certified as an information security management system (ISMS). This is the highest level of global information security assurance available today, and provides customers assurance that DocuSign meets stringent international standards on security.

Secure – Each Electronic Signature is unique, documentable, encrypted, and tamper-evident. DocuSign guarantees confidentiality of all transactions and furthermore provides multi-faceted verification of signing events.

Auditable – DocuSign provides a complete and extensive audit trail that serves as third-party validation of transaction completion, including information such as the signer's email address, name, authentication method, IP address with time stamp, and more.

KB:

The Agiloft Knowledgebase in which the business process and document records reside

Routing:

Also called Sending Order. This is the order in which e-signers are specified to e-sign the document. Within Agiloft the routing is typically achieved sequentially by specifying signers as 1, 2, 3, etc.; e.g., signer 2 will not receive the document until signer 1 has e-signed, etc. If the order of signatures is not important, you can specify parallel routing by assigning the same routing number to some or all of the signers.

Tags (or Tabs):

Indicators within electronic documents specifying actions to be taken by e-signers, such as "sign here", "initial here", "enter date", etc. Each signer could have different sets of tabs and each signer will only see the tabs meant for him or her.

Template:

A set of instructions that allow you to create a standard document, with pre-set recipient roles, signing tags, and information fields. Templates can also contain the signing instructions for the document and any signature attachments. Generally, templates are used for (1) saving personal often-used forms to easily resend the same form multiple times for reuse, and (2) filling in tags for commonly used forms such as tax forms, NDA agreements, and common applications. Templates can be set up both within Agiloft and on the DocuSign website.

E-SIGNING WITH AGILOFT

The DocuSign API (Application Programming Interface) to DocuSign will enable and facilitate the creation, sending, e-signing, management, and storage of your contracts, agreements, and other important documents through the use of DocuSign, the industry leader in secure electronic signatures.

You will be able to accomplish this in a variety of ways: either completely from within your existing Agiloft KnowledgeBase (KB), or through a shared functionality of KB processes and work done on the DocuSign website.

In general the DocuSign integration setup will progress as follows:

1. Sign up for a DocuSign account that fits your business needs. Agiloft can help with this process.
2. Become familiar with the Agiloft DocuSign API (this document) and the DocuSign website.
3. Set up and configure your KnowledgeBase to interface with your DocuSign account.
4. Set up DocuSign functionality for all employees who will be sending out documents.
5. Decide how the DocuSign process will be accessed and used – totally within the KB or not.
6. Create templates for commonly distributed documents with the Docusign tags preconfigured (optional).
7. Use the interface to send, sign, and manage your documents (KB only, or KB and DocuSign).

Although much of this process is managed within the Agiloft KnowledgeBase, all actual e-signing and emailing to/from recipients is done via the DocuSign website.

This document is primarily intended to describe the Agiloft KnowledgeBase processes. For DocuSign processes and issues, please consult the extensive information on the DocuSign website, although specific links will be provided in this document as appropriate.

The main user documentation links are at: http://www.docusign.com/support/downloads

http://www.docusign.com/sites/default/files/DocuSign_Service_User_Guide.pdf (204 pages)

http://www.docusign.com/sites/default/files/Account%20Administration%20Reference%20Guide.pdf (51 pages)

Overview of the Agiloft/DocuSign E-Signing Process

This section outlines the main points of the e-signing process. As was previously mentioned, Agiloft provides complete embedded DocuSign functionality that allows KnowledgeBase (KB) contract administrators to perform the most common e-signing procedures from within the KB.

In some cases, KB administrators may perform some of their e-signing setup, management, and reporting through the DocuSign website as well. This latter capability will be summarized in a final section of this document.

However you choose to implement document e-signing within your KB, there is a similar basic flow to the process. In general you will be sending documents from your KB to the DocuSign website which will in turn email invitations to the specified recipients inviting them to e-sign a document. Signers will be guided through the entire process by DocuSign and will be asked to input information at specified locations within the document marked by *tags*.

These tags (also called tabs) have typically been previously embedded in the document by the sender, either by inserting metadata information into the document itself or by using the DocuSign "drag and drop" functionality on the DocuSign website. The tags mark the specific locations in the document where each recipient is asked to "sign here", and where their name, title, and date signed will be placed.

A person who has been designated as both a DocuSign User in Agiloft and a User with Sender permissions in DocuSign is allowed to send out documents for e-signing. Procedures for setting up these permissions are detailed in later sections.

After an Agiloft document has been set up for e-signing, what gets sent to DocuSign is called an *envelope*, which can be thought of as a container similar to a paper envelope. Each envelope contains:

- One or more documents to be e-signed by one or more recipients
- Contact information for those recipients
- Routing information specifying the order in which the recipients will sign

General Description of the E-Signing Process

This is a general example based on a specific configuration. Exactly how this process will work depends on the configuration of your KB, the way you have configured the Docusign Create Envelope Action in Agiloft, the fields you will use to hold the signers, where you are storing the documents (in an attached file field in the Contract or in a Documents or Attachments table within the Contract), and whether you are generating the contract document and/or signature page from an Agiloft print template or working with a contract document that cannot be edited (i.e. a pdf file sent by a vendor).

1) First, establish procedures within your KnowledgeBase for how e-signing will be added into your existing contract administration and approval processes. This may include setting up templates with Agiloft $docusign:xxx metadata tags – this will be discussed in detail in Create/Update Print Templates to Add DocuSign Tags on Page 28.
2) Configure and Deploy the DocuSign interface (described in detail in Configure Your KnowledgeBase for DocuSign on page 14). This also pre-configures your default DocuSign envelope and sets up some default signer parameters. Also make sure your client/customer Company and all signers are set up in the Agiloft KnowledgeBase.

3) Create or edit the Contract record, ensuring that the DocuSign-relevant fields are populated:

   - Define the Signers in the Contract record based on the fields you have mapped in the Docusign Create Envelope Action (these will generate the DocuSign Recipients records).
   - Create or attach the Document(s) to be sent – again this depends on the specific configuration of your KB and where you are storing the documents to be signed – in a file field or in a related table.

4) When done updating the Contract, create the envelope that will be sent to DocuSign by clicking the "DocuSign Envelopes" tab in the Contract record:
   Click the "Create DocuSign Envelope" action button which was pre-configured in step (2) above.
   This will create the Docusign Envelope, mapping the attached file(s) to be signed, and will create the Recipient records based on the definition of the action button.
   If desired you can modify the signer (Recipients) information:
   Click the edit icon to change any existing recipient (signer) information
   Click "New" in the Recipients action bar to add a new recipient.
   Select a recipient and click the "Delete" icon in the action bar to delete a recipient.

5) Send the envelope to DocuSign:
   "Send" tells DocuSign to start the e-signing process without any envelope review.
   "Discard" deletes this envelope and does not send it to DocuSign.
   "Create & Preview" allows you to review the envelope and document at DocuSign:
   Check the signing tags for each recipient before the e-signing emails are sent out. If the tags were not previously added by generating the document from a print template, you can drag and drop them onto the document at this time.
   If you've created templates at DocuSign and your document matches one of them, you'll be given an option to "Apply the DocuSign template?" but if you have already set up the document and the recipient information in Agiloft with embedded DocuSign tags, just click "Cancel".
   Select each signer from the dropdown and verify that the signing tags they will see are correct.
   If not, you can edit the document to correct the tags or close the window to return to Agiloft.
   When all tags are correct, click "Send" at the bottom to generate notification email(s) to the signers.

6) DocuSign notifies each recipient in turn by email that a document is at DocuSign awaiting signatures.
   Note: recipient with Send Order=2 won't get an email until recipient with Send Order =1 has signed.

7) The Recipient/signer clicks the link in their email to be taken to the DocuSign website:
   The Recipient/signer must first "agree to do business electronically" with the sender.
   If the sender has specified an Access Code, the signer is asked to input it to gain access to the document.
   The Signer may be asked to select a signature style.

8) The Recipient/signer is guided through the document(s) to each place requiring his/her input:
   DocuSign combines all documents in the envelope into one file (noted by a separator in right pane).
   The Signer can navigate through the file for review before signing.
   The Signer will see any previous signings but not any tags meant for other signers.
   DocuSign prompts the signer for action at each tag.
   Note that the signer can decline signing, assign another signer instead, elect to sign on paper, etc.

9) After the signer has completed all requested actions, the signer is asked to confirm their signing by clicking the "Confirm Signing" icon on the left.
   The Sender receives status update emails as each signer processes the document.

DocuSign also maintains a complete history of all signer actions which is available to the sender.

10) DocuSign repeats steps 6-9 in turn for the next signer(s) specified by the sender (if any).
11) When all signing is complete, the sender and all signers get an email with a pdf of the fully-signed document. Rules defined in Agiloft can then automatically update the related Contract and Documents associated with the Contract.

Create and Configure an Account at DocuSign

As with most software, DocuSign accounts are priced according to the desired functionality. First you will need to determine how many of your employees and/or groups will need to send out documents for e-signing. These are the "Users" and they will need to be set up as such by your DocuSign account administrator. People who will be signing the documents, either at your company or at your customers or vendors, do not have to be registered at DocuSign. There are no restrictions on the number of document signers.

With an Enterprise account at DocuSign, you can have an unlimited number of users sending documents for signature. The pricing is based on the number of envelope transactions per year, with a minimum of 500 transactions per year at a current price of $5.75 per envelope, for a minimum retail annual price of $2,875/year. Volume and non-profit organization discounts are available. Contact DocuSign or Agiloft sales departments for additional information.

The next three sections will describe in detail the procedures for configuring your system at both Agiloft and DocuSign, sending out documents for signature from Agiloft, and e-signing documents at DocuSign.

Following that will be a brief discussion of other features available at DocuSign.

At the end of this document there are two appendices:

- Appendix A – Sample Contracts for E-Signing:
  This shows how to set up a contract with metadata tags for DocuSign.
- Appendix B - DocuSign Tables and Fields in Agiloft:
  This is a summary of the Agiloft additions for DocuSign functionality.

Configure Your KnowledgeBase for DocuSign

The DocuSign configuration will require actions both within Agiloft and at DocuSign.

- What needs to be done in Agiloft depends on whether you are adding DocuSign to an older KB that does not have it already deployed, or whether you are using a newer KB, dating from after May 2014, that has DocuSign pre-deployed. The pre-deployed KB will already have all the DocuSign Tables and fields, as well as some additional rules and other configuration that will differ from the deployment that is added to an existing KB.

As the DocuSign Account Owner you will already be set up as Account Administrator of your DocuSign account. The Administrator has full permissions to perform all operations on the DocuSign website. You will get an email from DocuSign with a link to click to activate your account and enter your password.

More DocuSign Account Administrator functions will be discussed in other sections of this manual.

Set Up the DocuSign Users (at DocuSign)

As the DocuSign Account Administrator you can set up additional DocuSign Users as Senders or Account Administrators on the DocuSign website. You can also grant certain types of Users special sets of privileges that you define. Remember, however, that any User set up on DocuSign must also be set up in Agiloft if that User will be sending out documents to be e-signed from the Agiloft KnowledgeBase.

Before Users can be set up on Agiloft they must first be set up on the DocuSign website. Depending on the User's permissions as set up by the Account Administrator at DocuSign, he/she could be allowed other privileges such as adding other Users, creating templates, specifying routing information for envelopes, etc. These privileges would apply only to envelopes sent out by this User from the DocuSign website, since any User sending out envelopes from Agiloft would already have these privileges. See the section "Permissions at DocuSign" later in this manual for details.

Note that some of your Senders/Users may already have a DocuSign account. If that is the case you can continue to use their existing DocuSign logon ID (email address) or you can create a new ID for them in your DocuSign account using a different email address. For bookkeeping purposes, it is probably desirable that all of your Senders/Users perform all their DocuSign activities from within one DocuSign account.

To add a DocuSign Sender at DocuSign, go to the DocuSign website https://www.docusign.net and logon as Account Administrator.

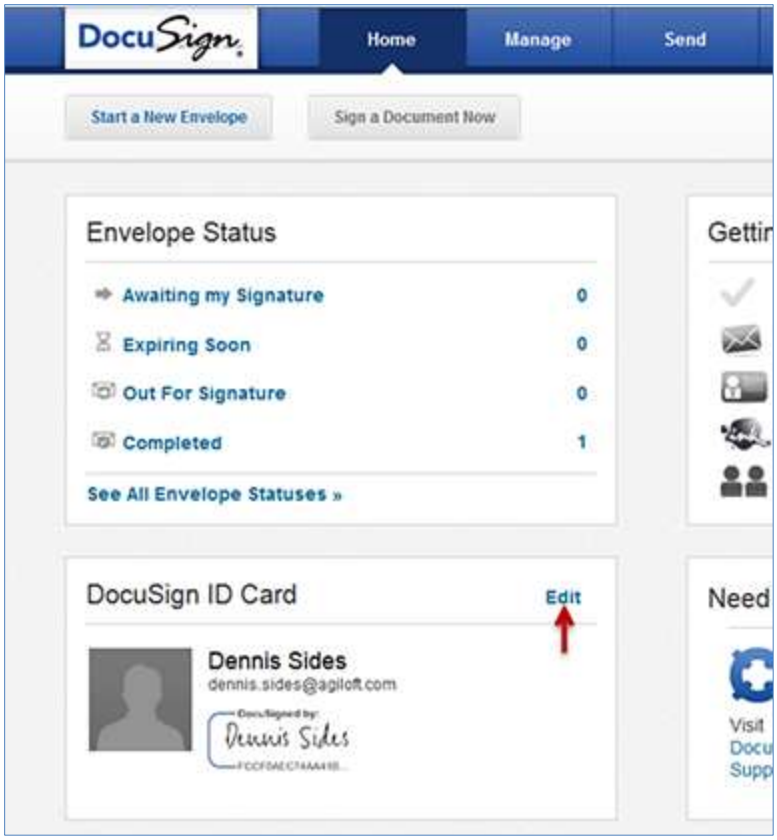


Figure 1 - DocuSign Home Page

On the DocuSign home page, click “Edit” in the “DocuSign ID Card” box. This brings up the full range of Administrator options in the left pane. The Account Administration options are shown below:

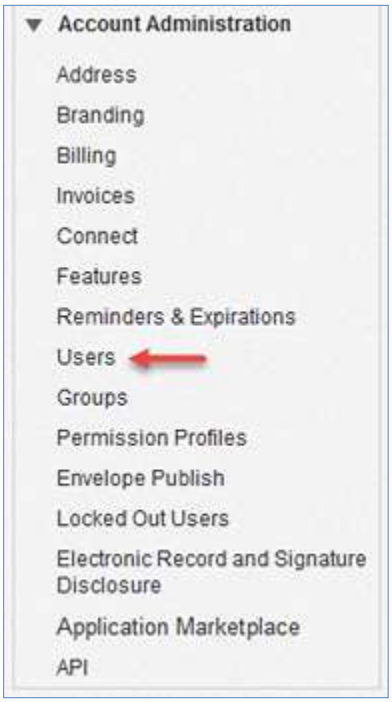


Figure 2 - DocuSign Account Administration Options

In the left pane in the “Account Administration” section, click on “Users”. Other functions can also be performed from this display. For example, Permission Profiles can be set for User types. Permissions can also be specially set for individual Users via the Users screen below.

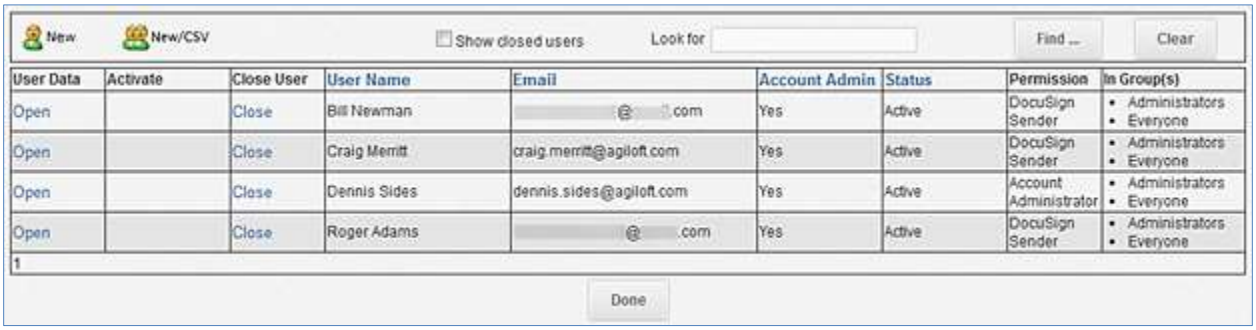


Figure 3 - DocuSign Users

This shows a display of all the active DocuSign Users for this account. Clicking the choice box for “Show closed users” will also display all previously active users. Clicking “Open” for any User will display more detailed information about their Account, Permissions, Address, and Sharing. Clicking “Close” for a User will close their DocuSign access and, by extension, close DocuSign functionality from Agiloft as well.

To set up a new User click the “New” icon in the upper left of the above screen. To set up a new “Comma Separated Value” list for bulk emailing click the “New/CSV” icon.

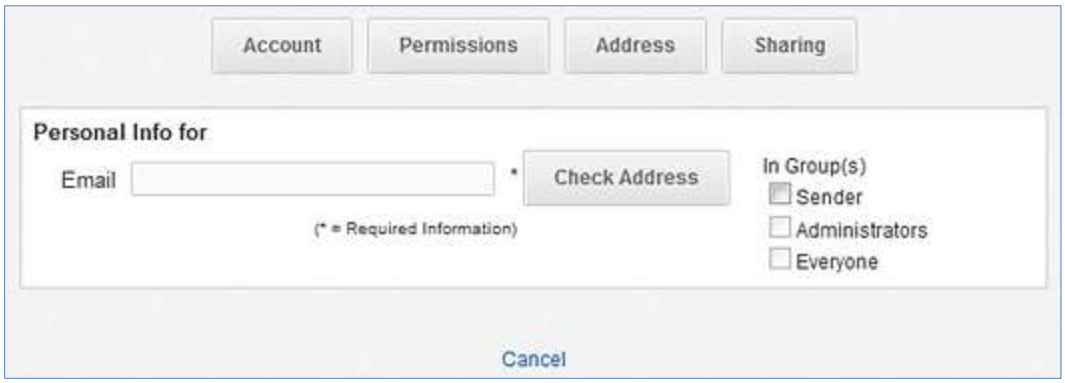


Figure 4 - Set Up DocuSign User

Consult the DocuSign Administrators Guide (page 9) for more details about the setup:

http://www.docusign.com/sites/default/files/Account%20Administration%20Reference%20Guide.pdf

In most cases all that is required is the new user’s email address and a click in the “Sender” group. The default permissions should be sufficient in most cases.

The new Sender will receive an email which, upon replying, will complete the setup in DocuSign. At that point the Agiloft Administrator can then also set up the user in the KnowledgeBase as a DocuSign User by the process described in the next section, “Set Up the DocuSign Extension (at Agiloft))”.

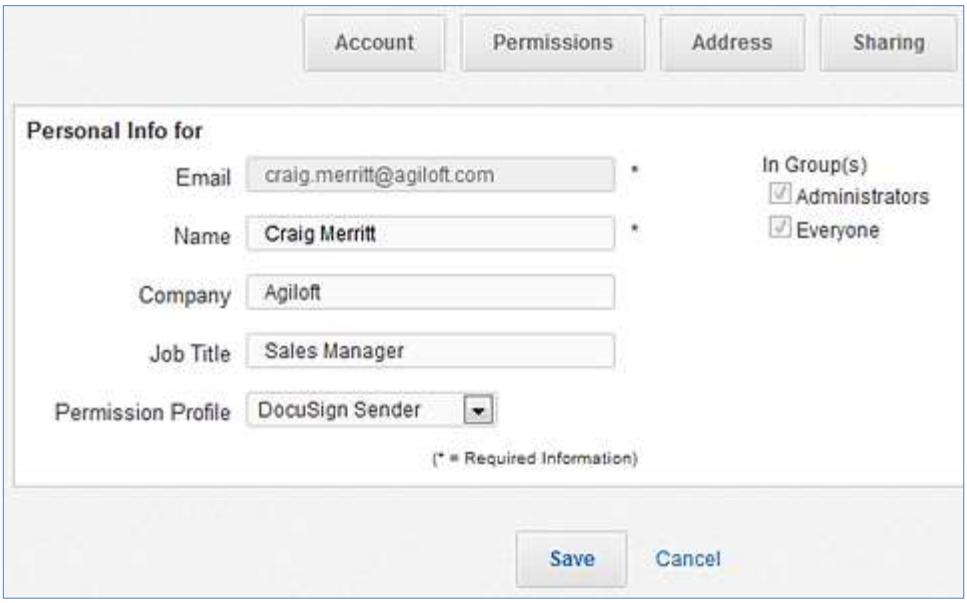


Figure 5 - View/Change Information for DocuSign User

SET UP THE DOCUSIGN EXTENSION (AT AGILOFT)

The DocuSign Account Administrator will need to have Agiloft Admin permission to launch and configure the Agiloft DocuSign Extension functionality.

After you have created your account at DocuSign, log into your Agiloft KnowledgeBase as a system administrator, and click on “Setup” in the left pane and then “System” on the right:

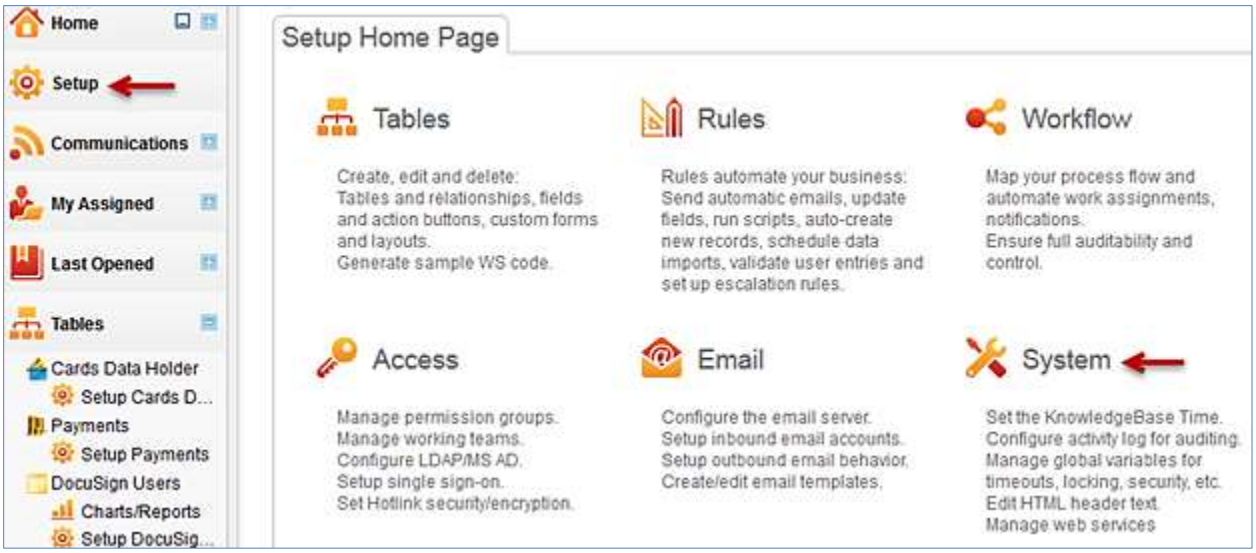


Figure 6 - Initialize the DocuSign Extension

Before DocuSign has been deployed, the “DocuSign Extension” action button will say “Deploy”. Once DocuSign functionality has been initialized, this button will change to “Configure”. This button provides access to many of the DocuSign administration tasks.

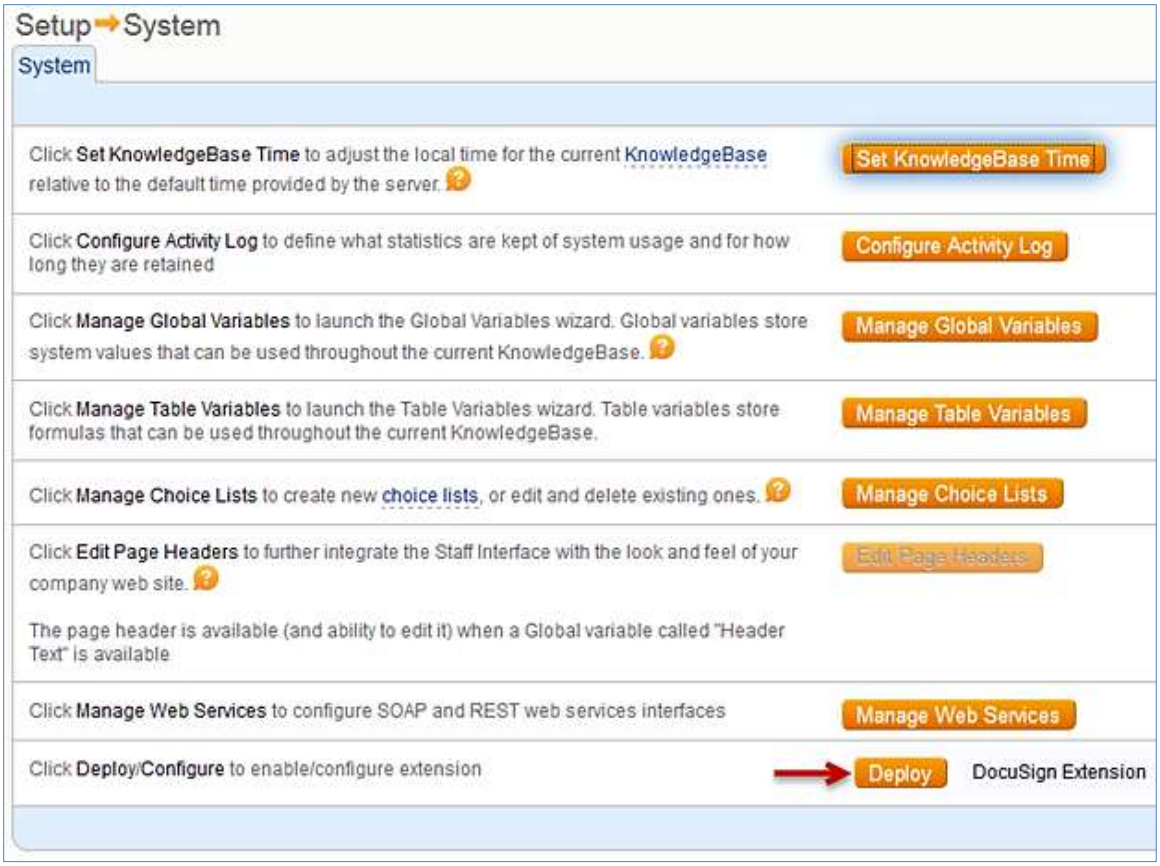

Setup → System
System
Click Set KnowledgeBase Time to adjust the local time for the current KnowledgeBase relative to the default time provided by the server.
Set KnowledgeBase Time
Click Configure Activity Log to define what statistics are kept of system usage and for how long they are retained
Configure Activity Log
Click Manage Global Variables to launch the Global Variables wizard. Global variables store system values that can be used throughout the current KnowledgeBase.
Manage Global Variables
Click Manage Table Variables to launch the Table Variables wizard. Table variables store formulas that can be used throughout the current KnowledgeBase.
Manage Table Variables
Click Manage Choice Lists to create new choice lists, or edit and delete existing ones.
Manage Choice Lists
Click Edit Page Headers to further integrate the Staff Interface with the look and feel of your company web site.
The page header is available (and ability to edit it) when a Global variable called "Header Text" is available
Edit Page Headers
Click Manage Web Services to configure SOAP and REST web services interfaces
Manage Web Services
Click Deploy/Configure to enable/configure extension
Deploy
DocuSign Extension

Figure 7 - Deploy the DocuSign Extension Functionality

If your Agiloft KB was created after May 2014, it will likely already have Docusign deployed and ready to use. If you see the "Configure" button, you will know that the basic deployment is already enabled. However, the appropriate Docusign server and other information will still need to be customized for the integration to be usable in production.

If using a KB in which DocuSign has been pre-deployed, some of the DocuSign Elements are hidden even from the admin user, to avoid them cluttering up the interface. The DocuSign Tables and fields are active and visible to a group called DocuSign User. To start using DocuSign, simply edit the admin user and add the "DocuSign User" group to his Groups field. You can repeat this procedure for any users that you want to be able to access/view the DocuSign tables and fields.

When adding DocuSign to an existing KB, when the "Deploy" action button is clicked for the first time, several tables and fields, rules, and updates are added to the Knowledgebase, so it may take several minutes for the process to complete and the screen in shown in "Figure **8** - DocuSign Extension Setup" to appear. **See Appendix B - DocuSign Tables and Fields in Agiloft for a description of the Tables, Fields, and Actions that are added as part of the DocuSign Deployment.**

After clicking the DocuSign “Deploy” or “Configure” button, the screen below will appear:

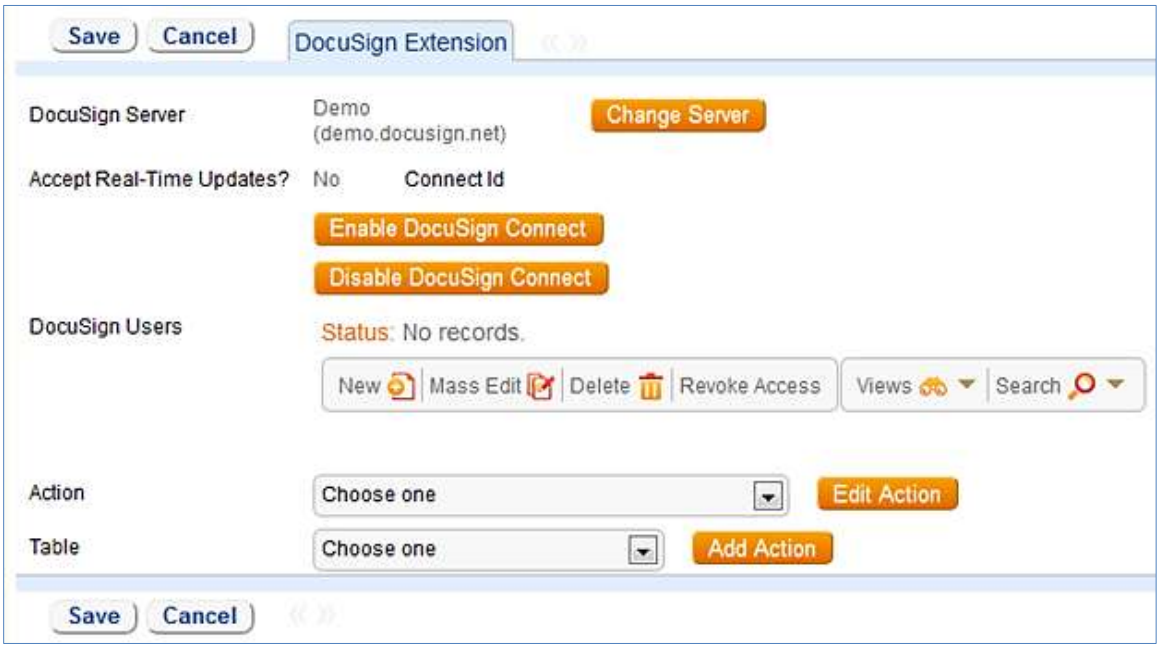


Figure 8 - DocuSign Extension Setup

Set Up the DocuSign Administrator

The first step is to set up the DocuSign Administrator as a DocuSign User in Agiloft.

- Remember that the DocuSign Administrator must be set up on DocuSign first. The user should also be created already in the People/Employees table in Agiloft.

Click “New” in the DocuSign Users action bar to bring up this screen:

DocuSign User
Save
Cancel
DocuSign User
*Login
dsides
*Full Name
Dennis Sides
DocuSign User Name(Email)
dennis.sides@agiloft.
Access Granted
No
DocuSign Password
User must be authorized to send envelopes/documents. If you are self-registering, please type in your DocuSign User Name(Email) and Password(it wont be stored locally) to grant access. If you are DocuSign Account Administrator you can grant access to other users by typing in their User Name/Email and leaving the password field blank.
Grant Access to DocuSign
Save
Cancel

Figure 9 - Add DocuSign System Administrator as the first DocuSign User

Look up the user by typing their login or Name into the fields and using the lookup.

- Full Name – The user's Full Name in Agiloft should match the name input at DocuSign.
- DocuSign User Name (Email) – must match the email address input at DocuSign
- DocuSign Password – must match the password input at DocuSign (you must type this in)

Then click the "Grant Access to DocuSign" action button to add the Administrator.

Before proceeding, if you are logged in as a different user to Agiloft, logout and log back into Agiloft as the DocuSign Administrator user you just set up.

Define the DocuSign Server

DocuSign assigns its customers to a specific server type, which maps to a DocuSign web address.

In most cases this will be a production server called "NA1" which will use www.docusign.net. "NA1" will generally be the value that should be selected.

Other server choices available via the "Change Server" action button are:

"NA2" – also for production accounts

"Demo" – for demonstration (i.e., non-production) accounts

"EU1" – call your DocuSign representative for more information

"Preview" – call your DocuSign representative for more information

- If using a KB in which the basic Docusign Extension has already been deployed, the Server value will be set to Demo. This must be changed to the appropriate server before you can use the system in production. To change it, click the "Change Server" button.
- When the DocuSign account is created at DocuSign, the account administrator should be provided with the server type.
- The server must be changed before the DocuSign Connect is Enabled. If you forget to do it before enabling the connection, you will need to Disable the Docusign Connect by clicking the button.

"Accept Real-Time Updates?" should be set to Yes. This enables envelope status updates to be posted back to Agiloft (recommended).

Once the Docusign server has the correct value, you are ready to enable the connection.

Enable DocuSign Connect

The DocuSign Administrator can now enable the Agiloft DocuSign Connection by clicking the "Enable DocuSign Connect" action button.

You have the option of disabling DocuSign functionality anytime later by clicking "Disable".

- You need to click "Enable DocuSign Connect" before the other DocuSign Users are added.

Once the connection is enabled, additional users may be added.

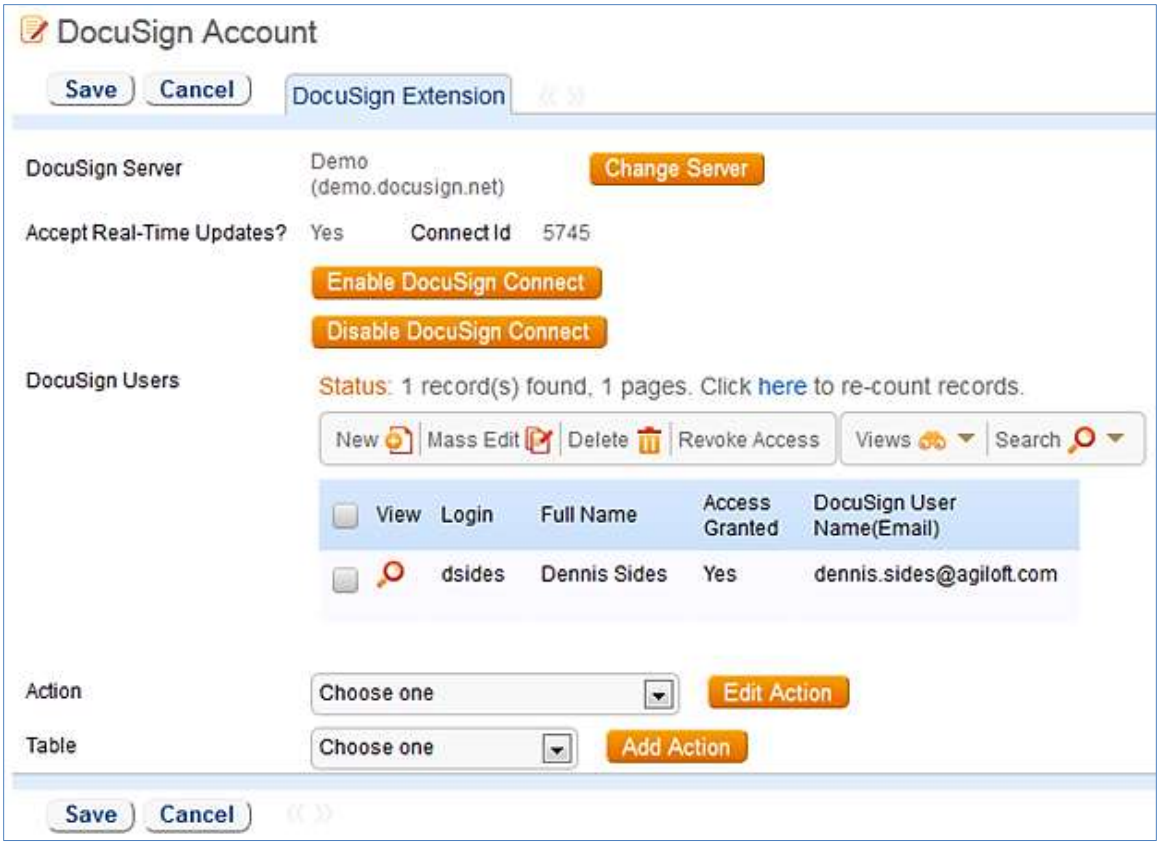


Figure 10 - DocuSign Extension Configuration

The remainder of this section will guide the DocuSign Administrator through the rest of the setup process. Note that there are some optional areas at the bottom of the screen for setting up DocuSign Actions, Tables, and Recipients. These functions can be specified here now or at any time later.

ADD THE REMAINING DOCUSIGN USERS

These will be the people who will be sending out documents to be e-signed. You can add them now or later via this screen (Setup -> System -> Configure DocuSign Extension).

Again, DocuSign Users (Senders) will have account records on both Agiloft and DocuSign. DocuSign Recipients (Signers) are not required to have Agiloft or DocuSign account records.

Every person who sends out documents for signature (called a "DocuSign User" in Agiloft and a "User" with "Sender" Permissions at DocuSign) must have a user record in the following places:

- The People/Employees table of Agiloft
- The DocuSign Users table
- The Users table of the company's account at DocuSign

People who will be receiving those documents to sign (called DocuSign Recipients in Agiloft) are not required to be registered in Agiloft or at DocuSign, though it is ideal to create person or contact records for them in Agiloft.

To add DocuSign Users in your KnowledgeBase, click "New" in the "DocuSign Users" area on the DocuSign Extension screen (Figure 10 - DocuSign Extension Configuration) to go to the screen below:

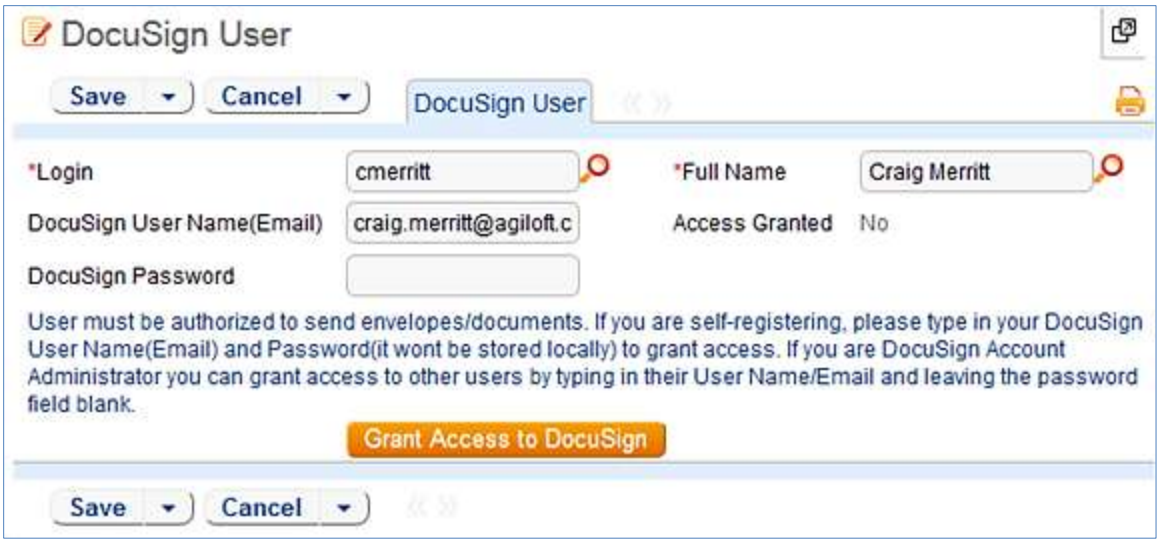

DocuSign User
Save
Cancel
DocuSign User
*Login
cmerritt
*Full Name
Craig Merritt
DocuSign User Name(Email)
craig.merritt@agiloft.c
Access Granted
No
DocuSign Password
User must be authorized to send envelopes/documents. If you are self-registering, please type in your DocuSign User Name(Email) and Password(it wont be stored locally) to grant access. If you are DocuSign Account Administrator you can grant access to other users by typing in their User Name/Email and leaving the password field blank.
Grant Access to DocuSign
Save
Cancel

Figure 11 - Add DocuSign User

Enter the following information:

Login: This is the Agiloft login for this DocuSign User.

Full Name: This is the first and last name of this DocuSign User, pulled from the Person record.

DocuSign User Name (Email): This is the email address for this DocuSign User. This will be the login for this User at DocuSign.

Access Granted: This is a display-only field; it will change to "Yes" upon a successful add at DocuSign.

DocuSign Password: If you are registering yourself, enter (or create) your DocuSign password. If you are the Administrator and are registering someone else, leave this blank.

- DocuSign passwords are not stored in the Agiloft KnowledgeBase.

Then click the "Grant Access to DocuSign" action button to add the User to Agiloft.

- Remember that the DocuSign User must have been previously invited (and have accepted) to be set up as a DocuSign User at Docusign.

A successful User addition will look like this:

Figure 12 - Add DocuSign Users

At this point, the person is set up to send documents for e-signing through Agiloft and DocuSign.

- The Agiloft admin must create at least one authorized User with **DocuSign admin permissions**. This enables push notifications from DocuSign to Agiloft so that envelope/recipient statuses are returned by DocuSign to Agiloft and that updated/signed pdf documents are attached back to the DocuSign Envelope record and emailed back to the Sender and all signers.

Deciding How to Store the Signers and Documents in Agiloft

If you are adding DocuSign to an existing KB, you may want to add some new fields or tables to Agiloft to hold some of the information related to DocuSign. Please see Appendix B - DocuSign Tables and Fields in Agiloft for a list of the tables and fields that are added with the DocuSign Extension.

Some new fields are automatically added to the Contracts Table. These include three linked sets of fields for the signers: Internal Signer, 1st Party Signer and 2nd Party Signer, along with their email, title, and so on. These fields are linked to the People table, but they do not require a source record, that is, they allow you to type a new name, email, title and so on into the field for a given Contract.

If you may need additional signers or want to use different fields for your signers, you can add them. Or if you are running DocuSign against a Table other than Contracts, you may want to add fields to that table to hold the Signers.

Document handling is another element you may want to adjust on an older implementation when you enable DocuSign. It is recommended that when integrating with DocuSign for e-signature, an embedded Attachments or Documents table is used within a Contract, rather than an attached file field, because this gives greater control over the documents sent for signature.

If an attached file field is used, it is not possible to select only some files in the field for signature. Whereas, if an Attachments table is used, then a multivalue link to that table's file field allows the contract manager to select the specific documents he wants sent to DocuSign for Signature.

- The default setup for systems created after May 2014 will have such a configuration, and the field called Files to Sign will be the one selected by default for the DocuSign Action.

There are a few options for handling attached files that you may want to consider:

1) **Moving all files into an Attachments table** that has a link to the Contract (and/or to other tables to which an attached file may be related). Typically with this implementation, you will set up conversion from an attached file field in the Contract to a record in this table, mapping the file into a new Attachment record, and then emptying the attached file field in the Contract record. This way, print templates that create documents or inbound emails would both add the file(s) to a local field in the Contract, then have it moved automatically into one or more Attachment records for better control.

   If this method is used, then you would create a field in the Contract that is a "link to single field from other table" with multiple values enabled, with the source being the attached file field from the Attachments table. The records are filtered to those Attachments for the current Contract. This field provides a list of all related files and it can be labeled: Files to Sign, so that the DocuSign sender can simply select the files he wants to be part of the DocuSign envelope. This is then the field that is used in the DocuSign Envelope creation action.

- The above is the default setup for systems created after May 2014.

2) **Adding a new Attached File field** just to hold the documents for Signature. This allows the Sender to upload just the files he wants to send from a selection of other files. However, the drawback is that he must first store the files locally in order to upload them.

3) **Cleaning unwanted files out of the DocuSign Envelope before Sending** – When the DocuSign Envelope is created, it can automatically map the files from the main Attached File field in the Contract. The sender can then click the garbage can icon next to the files he does not want to include in the envelope to remove them before sending to DocuSign. The only downside to this is that it relies on users to remember to remove unwanted files.

The decision about signers and files and where you will be storing the documents to be signed must be made and implemented before you can effectively customize the DocuSign Envelope Action.

Review/Configure DocuSign Envelope Creation Actions

The Action and Table dropdowns and buttons provide shortcuts to customizing the DocuSign-related actions that may be running in different tables within Agiloft.

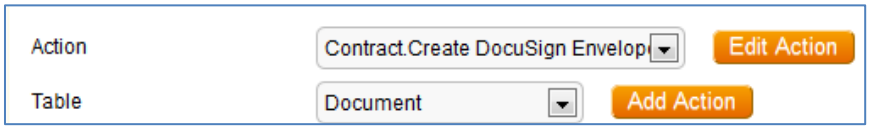


Figure 13 - Configure Action Options

By default, when you turn on the DocuSign extension there will be one action defined for the Contract Table to Create Docusign Envelopes. That action can be edited from here by selecting it and clicking the "Edit Action" button. It will also be found in the list of available actions in the Contract Table Rules area.

The Table drop-down here allows the administrator to choose another Table in the system and add a DocuSign Envelope Creation action here directly.

- The "DocuSign Action" is a new action type available for Rules and Action Buttons once DocuSign is enabled.

When DocuSign-related Actions are displayed in the Rule Wizard, they are all prefixed by a ?:

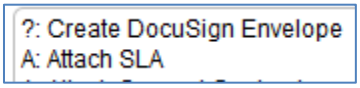


Figure 14 - DocuSign Action Prefix

The DocuSign Action Wizard

A DocuSign Action can be configured for any table in Agiloft. By default, when we enable the DocuSign extension, we add the action to the Contracts Table. We preconfigure it to use certain fields for the documents to be sent, the signers, and so on.

These settings can be changed to fit your preferred configuration by editing the action itself. The action defines the fields that represent the signers, the signing order, signer roles, the email subject and message lines for the emails sent to the Signers from DocuSign, and the location of the files to be signed within the record. This information can be set up initially and modified at any time later as business needs change.

The following section describes the default setup of the Contract Table Create DocuSign Envelope Action. The options are accessed by selecting the action from the Action drop-down shown in Figure 10 - DocuSign Extension Configuration above and clicking the "Edit Action" button:

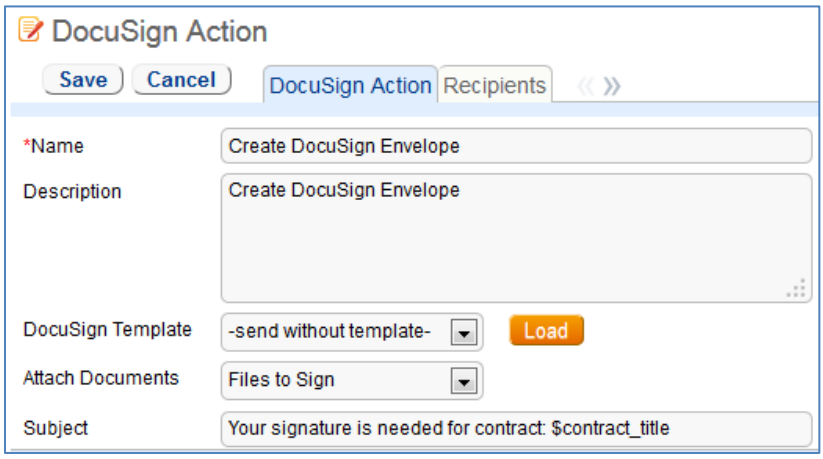


Figure 15 - DocuSign Action Wizard

There are default entries for the fields, but they can be changed:

Name: This is the name of the action itself

Description: This is the description of this action.

DocuSign Template: This dropdown will list templates already set up at DocuSign by the Admin (if any). Template creation at DocuSign will be described in a later section of this manual. If there are DocuSign templates, one can be selected and downloaded by clicking "Load". A downloaded template will populate fields on this screen and in the Recipients tab.

If a DocuSign template is not to be used, select "-send without template-".

- Most Agiloft customers will find it more convenient to use Agiloft print templates instead of DocuSign templates.

Load (action button): Click this action button to download the selected DocuSign default template to be used (if any).

Attach Documents: This dropdown lists the fields in the Contracts table (or the table on which the action is being created) that are of type "File with Versioning" or "Link to Single Field in another table" of type File (with one or multiple values enabled). The file field selected here will be mapped into the DocuSign Envelope when it is created and the files attached there will be sent to DocuSign for Signature.

Subject: This is the default email Subject line that all Recipients will receive when they are invited to sign. Variables from the record may be included in the Subject. For instance, if the Subject was "$contract_title", the title of the contract would be used. The default email body message for each signer will be included on the Recipients tab.

Set up the Recipients on the Recipients Tab

Up to five default email Recipients (Signers) can be specified by clicking the "Recipients" tab on the DocuSign Action screen. Note that Recipients can also be entered manually when creating a DocuSign envelope. This will be described in the section: Create a DocuSign Envelope on page 40.

In the screen below (Figure 16 - Add DocuSign Action Default Recipients), three default recipients (e-signers) have been specified in the default DocuSign envelope creation. In this example, one "Internal Signer" (e.g., someone from your company) and two external signers (people from your client's or customer's company) are specified. Note that any of these default recipients can be overwritten or edited before the contract is sent out for signatures.

In a given contract, if there are only one or two signers defined, then the additional signers are simply ignored, so the action should define the maximum number of signers for a document.

There is a strict relationship between the information in these fields, the metadata signing tags in the contract document or template, and the order in which documents need to be signed. More details are provided in "Procedures for Sending Documents to DocuSign" for how these fields interrelate and how all this information needs to be set up to populate the DocuSign envelope.

Below is a summary of the data fields in Figure 16 below:

Number of Recipients (1-5): This is the number of people who will receive an email notification about this document. Based on the number selected here, additional fields appear or disappear.

Sending Order: Integer indicating when DocuSign sends out email notifications to the specified recipients. Sequential: Recipient "1" will be notified before Recipient "2", etc. Parallel: If it doesn't matter which of, say, two recipients needs to sign first, their Sending Order should be set to the same number. Any subsequent signers would not be notified until both of the parallel signers had signed.

Role Name: This is a dropdown box for selections from the DocuSign Roles table (which is modifiable). These Role Names must match exactly any metadata tags in the template/document.

Role: This is the "action" that this Recipient is to perform. The dropdown has choices of "Certified Delivery", "Editor", "CC", "Agent", and "Signer". Signers are required to Sign before the envelope is marked as Completed.

Recipient Field: This dropdown list includes all the linked fields to the People table in the Contract table. These linked fields may be strict or loosely linked fields. The Recipient record will be populated with the data for the person in this field for a given contract.

Access Code (optional): The recipient must type in this code at DocuSign to gain access to the document.

Message (optional): This enables a special email message to be added to the standard DocuSign text for this recipient.

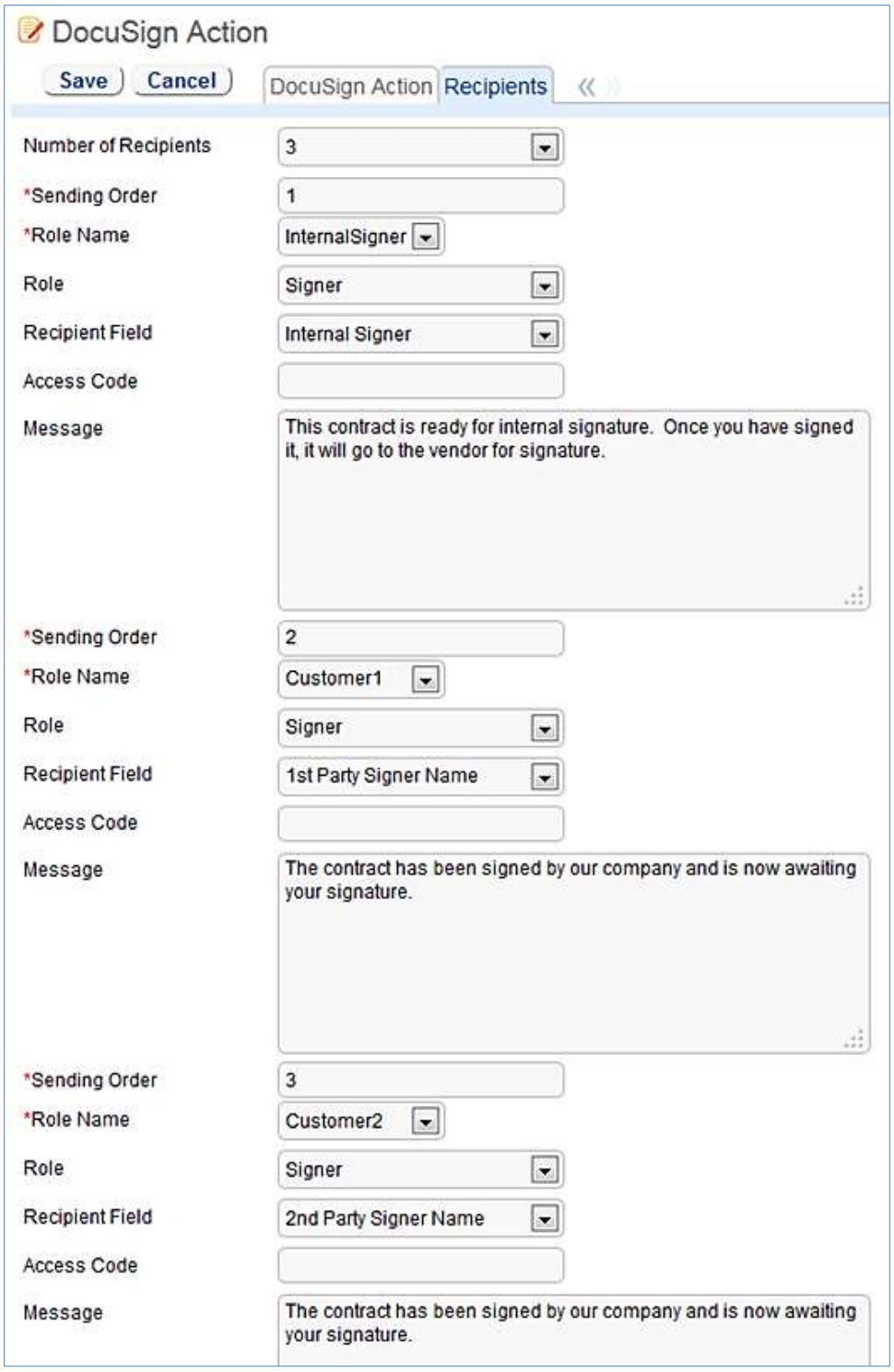


Figure 16 - Add DocuSign Action Default Recipients

CREATE/UPDATE PRINT TEMPLATES TO ADD DOCUSIGN TAGS

For commonly sent-out documents like support contracts, non-disclosure agreements, etc., Agiloft DocuSign Users (also known as DocuSign Senders) can set up time-saving templates either within the Agiloft KnowledgeBase or in their account at the DocuSign website: https://docusign.net. For most purposes, Agiloft templates will be much more useful, as they can populate field variables from the Contract or Record into the template automatically.

This section explains the Metadata Tags that can be added to Agiloft print templates in order to pre-tag documents, so that Senders do not need to add any steps to their normal process.

For more information on DocuSign template creation and usage:

- Review section "Templates at DocuSign" of this document
- Review the DocuSign Template Guide at:
https://www.docusign.com/sites/default/files/Quick%20Start%20-%20Using%20Templates.pdf

Agiloft Metadata Tags

Your Agiloft KnowledgeBase may already be using Print Templates in which special tags (known as metadata) are pre-inserted into documents. These metadata tags are "placeholders" only, and become populated with specific company and/or customer data when the template is processed at Agiloft.

For example, a metadata tag such as "$formula($company)" (without quotes) could be inserted into a contract template at a specific place, and when the contract document is processed this tag gets replaced by the actual name of the company.

If you are not familiar with the Print Template functionality, it is recommended that you review that section of the Administrator Manual for Agiloft.

All metadata tags begin with the "$" character (without quotes). The metadata tags relating specifically to DocuSign are of the form "$docusign:<type>:<field name>:<role name>" (described below).

Agiloft Metadata Tags for DocuSign

In addition to the standard Agiloft metadata tags there are special metadata tags that enable DocuSign functionality within contract templates. These tags allow DocuSign signing icons (e.g., "Sign Here", "Initial Here", etc., indicators) to be created automatically by generating the Contract document within Agiloft, so that signers do not have to perform manual drag and drop operations on the DocuSign website. Using these pre-built templates reduces effort, standardizes DocuSign procedures, and reduces e-signing errors.

These special metadata tags need to be added to any MS Word contract print templates being used by the system. These tags will then be translated into DocuSign commands to display/retrieve data and/or display the signing icons. Some "$docusign:Text:xxx:yyy" tags can even post back to Agiloft information that was keyed in at DocuSign during the signing process.

The Agiloft DocuSign tags are signer-specific, that is, they relate specifically to that signer. Assigning signers and their signing order will be described immediately after this DocuSign tag discussion. An example will then be given to make the entire process easier to follow.

Note that in the tags below there are no actual quote marks. They are added only for emphasis or clarity. In some cases, like <type>, the quotes indicate the exact term. For <role name> the quotes

indicate the exact term the user selected for the “Role Name” field in Figure 16 - Add DocuSign Action Default Recipients.

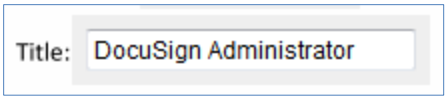
The format for all Agiloft DocuSign tags is: “$docusign:<type>:<field name>:<role name>”, where:

- $docusign: begins each metadata tag for DocuSign functionality.
  The Agiloft DocuSign API translates these tags into commands for DocuSign to process.
- <type>: is one of “SignHere”, “FullName”, “Title”, “DateSigned”, ”Company”, or “Text”.
  “Text” is the default type and is used to display a wide range of text fields.
  “Text” tags can also be used to retrieve data typed in by the signer (described later).
  Note that there are no quote marks in <type> – quotes are shown here only for readability.
- <field name> (optional): null, or the specific field name (in Agiloft) that you want to be inserted or retrieved.
- <role name>: the explicit “Role Name” of the signer which is assigned during envelope creation. This tag gets assigned to a specific signer via the <role name> parameter. There is a one-to-one correlation between <role name> in the metadata tag $docusign:<type>:<field name>:<role name> and the “Role Name” parameter specified for that signer in the Create a DocuSign Envelope section on page 40. The choices in the <role name> dropdown come from the entries in the DocuSign Roles table.

Here is a list of some standard Agiloft metadata tags for DocuSign and their functions:

- $docusign:SignHere::<role name>
  Inserts a “Sign Here” icon in the document where signer <role name>=“Role Name” is expected to sign:

- $docusign:FullName:<field name>:<role name>
  The <field name> parameter will come from the dropdown selection for “Recipient Field” for that signer (=Role Name) in the “DocuSign Action” configuration screen (Figure 16 - Add DocuSign Action Default Recipients). Agiloft inserts the full name of the <role name>=“Role Name” person from the People table (if via lookup), or from the name typed in on the Contracts -> DocuSign Envelopes for that signer.
- $docusign:FullName:internal_contract_owner:<role name>
  Agiloft inserts the Internal Contract Owner field from the Contract record.
- $docusign:FullName: party1_signer_full_name:<role name>
  Agiloft inserts the 1st Party Signer Name field from the Contract record (in the DocuSign Envelopes tab).
- $docusign:Title::<role name>
  DocuSign will pre-fill this field from the last time this signer typed in their title at DocuSign, otherwise the signer is prompted to type in their title. DocuSign stores title information for both users/senders and signers, but signer titles are not shown in its address book display.



- $docusign:DateSigned::<role name>
  DocuSign auto-fills this field with today's date when the <role name> person signs the document.
- $docusign:Text:contract_title:<role name>
  Agiloft inserts the Contract Title from the Contracts record (from the Contract Details tab).

💡 The latter is just an example of what is possible. In actual practice an Agiloft print template would just insert the variable directly onto the Document by using the standard variable: $contract_title. There is no reason to use a DocuSign tag for a field that can be inserted directly from the Contract.

Example of Setting Up a DocuSign Contract

For example, assume the company "ABC Electronics" is a fictional customer of Agiloft whose annual support contract is up for renewal. Here is some information from the ABC Electronics company record:

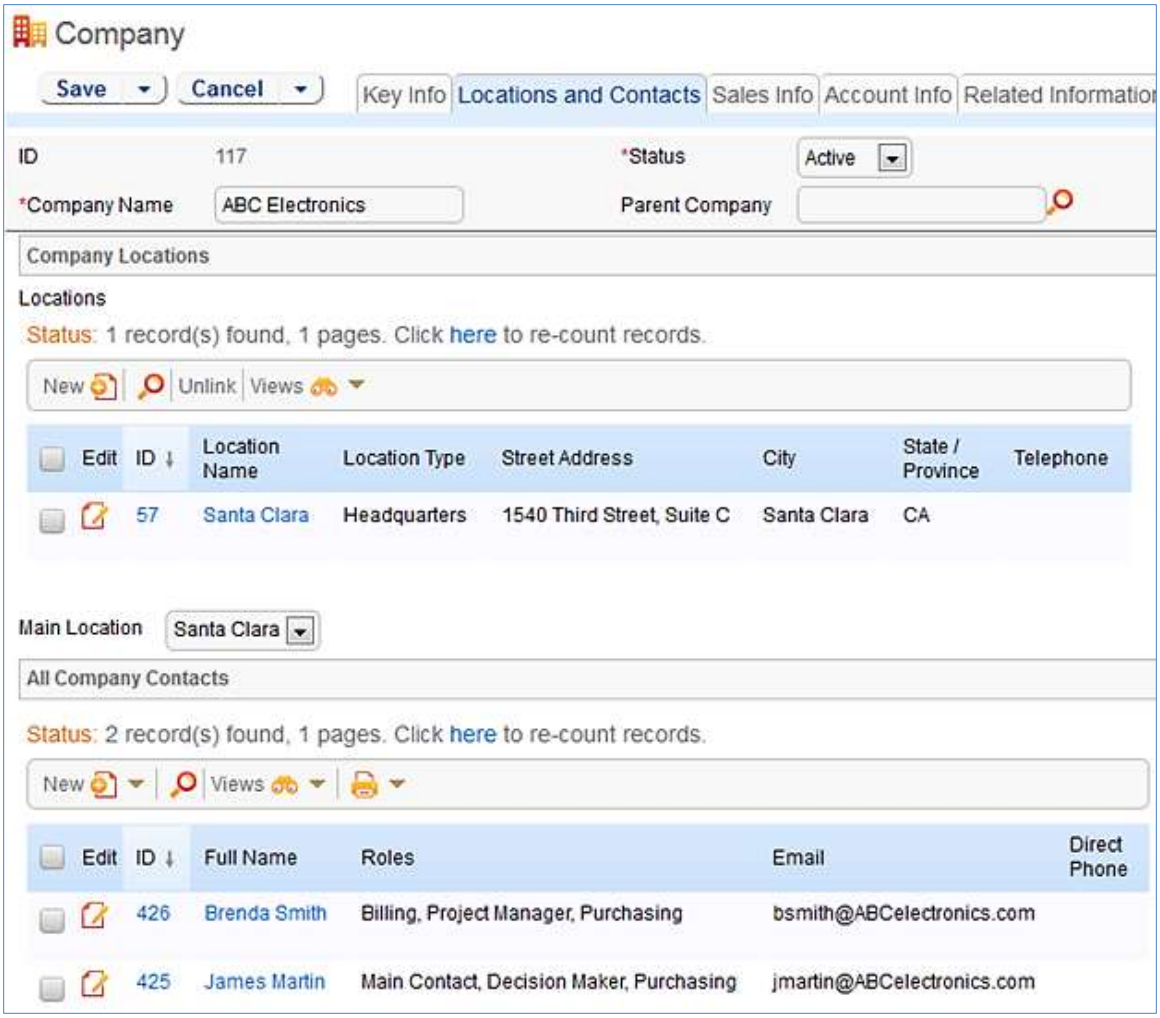


Figure 17 - ABC Electronics Company Contacts

In this example the support contract renewal will be signed by one Agiloft employee (Bill Newman) and two ABC Electronics employees (James Martin and Brenda Smith).

The following screen shows the simplified signing block for the contract. Here the $docusign:xxx tags are made visible and shown in a red font color, but **in "real life" they need to be made "invisible"** (i.e., font color = white). Also note that the tag font sizes may need to be made smaller to fit within the actual wording space in the document. The use of Word frames may be necessary to fit lengthy $docusign:xxx tags into the space allotted, due to the way DocuSign overlays the tag fields instead of replacing them. Word frames are smaller "windows" which contain longer text strings which can be viewed in their entirety by scrolling through them horizontally.

So some initial "trial and error" testing may be required to properly position the signing tags in your templates. More about these issues later.

The metadata tags in the document below will be linked to individual signers in Step (2) further below, "Create a DocuSign Envelope."

g) This Agreement may be signed in one or more counterpart copies, all of which together shall constitute one Agreement and each of which shall constitute an original.

IN WITNESS WHEREOF, the parties of

Agiloft

Signature: $docusign:SignHere::InternalSigner

Name: $internal_signer_fullname

Title: $internal_signer_title

Date: $docusign:DateSigned::InternalSigner

$company_name

Signature: $docusign:SignHere::Customer1

Name: $party1_signer_full_name

Title: $docusign:Title::Customer1 (note: if you are capturing the signer's title in Agiloft, you can replace this with the Agiloft field variable, i.e., $party1_signer_title)

Date: $docusign:DateSigned::Customer1

Signature: $docusign:SignHere::Customer2

Name: $party2_signer_full_name

Title: $docusign:Title::Customer2

Date: $docusign:DateSigned::Customer2

Figure 18 - Contract Signing Block as Seen at Agiloft

A few observations on the variables used above:

- Using a DocuSign tag with Text or one of the standard tags will typically ask the Signer for the information when he signs. For instance, if you use the DocuSign Title tag, the signer will be asked to type in his Title when he signs (then DocuSign will remember it for future signings). If you are storing the Signer's Title in a Contract field already, then you could simply use an Agiloft field tag instead to populate the Signer's title into the printed document even before he signs (as shown above for the Customer1/Party1 Signer).

- Likewise the Signer's Full Name can be prepopulated from the field in Agiloft, or it can be requested by DocuSign when he signs.

There are a couple of reasons why you may want to use a DocuSign Tag over an Agiloft one – you may get more complete data that way, since Signers are asked to fill out the field. Also, signers may delegate their signature authority to another person at their company, so the actual signer may not match the Agiloft Signer data.

Shown below is what that signing block page will look like for the first ABC Electronics signer (James Martin, whose Role Name = Customer1). At this stage the contract has been sent out for signature and has been signed by the Agiloft contract administrator (whose Role Name=InternalSigner).

💡 Note that the tags above in red font have been made "invisible" by specifying white font.

The first ABC Electronics signer, James Martin, will see the display below. Note that no signing tags appear yet for the second Customer2 signer, Brenda Smith. Signing order will be explained in the section, "Create a DocuSign Envelope".

The fields filled in by DocuSign for the Agiloft signer and the first Customer1 signer are underlined for clarity.

g) This Agreement may be signed in one or more counterpart copies, all of which together shall constitute one Agreement and each of which shall constitute an original.

IN WITNESS WHEREOF, the parties for Agiloft Support Contract

Agiloft

Signature:

Name: Bill Newman

Title: Contract Administrator

Date: 04/02/2014

ABC Electronics

Signature:

Name: James Martin

Title: Purchasing Manager

Date: 04/03/2014

Signature:

Name:

Title:

Date:

Figure 19 - Contract Signing Block as Seen at DocuSign

Given the need for DocuSign Tags to be added to a Document, the most efficient way to use DocuSign is to "templatize" as many of your Contract types as possible into standard print templates that can be generated by Agiloft to create your Contract documents. This way, the tags can be pre-configured and will be present in the Contract Documents without staff members needing to worry about them.

Print Templates can be stored as an attached file associated with a Contract Type record or in a separate table of Print Templates that can be selected by Contract Managers within a Contract to define which document should be generated. An Attached File action can be triggered by an action button (Create and Attach Contract) to generate a Word or PDF file based on the Print Template document and attach it to a file field in the Contract (and from there into a linked Attachment Record).

The Agiloft Professional Services Team can assist with designing your print templates and determining the best way to store and manage them.

However, there are inevitably Contracts or Documents requiring signatures that cannot be generated from a preconfigured Print Template, and the next section discusses the ways you may decide to handle this scenario.

Signing Contracts Provided by External Parties

When using DocuSign to gather electronic signatures on documents that are provided by vendors or other third parties (and that are therefore) not based on preconfigured templates, the DocuSign tags need to be added to the document(s) manually.

There are a few choices for how to manage this process.

Contract Manager Manually Adds Tags in the DocuSign Interface

Once the DocuSign Envelope is created in Agiloft, the button to "Create & Preview" brings up the document(s) loaded into DocuSign for confirmation before sending. From here the contract manager can navigate to the signature blocks and manually drag the tags for each signer onto the Document. See the discussion starting at Figure 30 - DocuSign Signing Tag Review.

Pros:

- This is a straightforward and clear process, and is easy for contract managers to learn.
- It can accommodate any number of signers and special tags, including adding initials on any page.
- Combined with a check of the signer email addresses and document, it doubles as a good final preview of what will be sent for signature.

Cons:

- It is tedious if there are many tags being added, and there are typically four for each signer (Signature, Name, Title, Date Signed).
- There is room for user error – putting the wrong signer role with the wrong block, forgetting to add all the tags, etc.
- It requires manual user intervention between when the contract is ready for signing and when it is actually sent for signature.

Signers Add Tags while Signing

If no tags are added before the document is sent for signature, then the signers can add the tags manually when they sign. The interface in DocuSign allows them to add tags for date, name, title, and their signature to the appropriate places in the document (see Figure 30 - DocuSign Signing Tag Review).

Pros:

- This spreads the burden of tagging to the individuals doing the signing.
- It allows the process of sending to happen automatically without user intervention.
- The Contract manager doesn't have to spend time manually entering all the tags.

Cons:

- The user interface is not as simple as it might be – signers may become confused about how to add tags and sign.
- You do not typically train your external signers, so you cannot ensure that they do it correctly.
- The process may bog down due to signer confusion.

Using a Preconfigured Signature Page Template

Using Agiloft's Print template capabilities, it is possible to preconfigure one or more signature pages to "add" to any documents provided by vendors. The signature page can consist of preconfigured DocuSign tags for the signers so no tags need to be manually added to the document.

Some legal language may be added to the page, in addition to the title of the Contract or any other fields from the contract or document record in Agiloft.

If the contract provided by the vendor is in .docx format, it is possible to define an Attached File action that will merge the signature page print template with the contract document to create a new .docx or .pdf document file that is then sent to DocuSign.

Pros:

- The DocuSign tagging is automated so users don't have to worry about it.
- The signature page can be merged using an action button or a rule, so the contract manager can control it manually or built-in logic may be applied, such as "if the Standard Contract Used field has a No value, append the signature block, otherwise don't."
- There is less room for error since the system controls the tagging and it is preconfigured by the administrator.
- The signers' names and titles can be pulled automatically from Agiloft so they would not have to type in their name or title when they add their signature in DocuSign.

Cons:

- There may be legal issues with using an appended signature page instead of the preexisting signature block on the contract (which would **not** be used).
- The number of signers and their identities would need to be stored in Agiloft before the signature page is generated so they can be populated into the signature page.
- If the contract is a pdf file, it cannot be merged with the signature page, so they would be stored as two separate documents.
- It requires some semi-complex automation for the print template to be merged, a new document created, and that document added to the contract for selection to send to DocuSign, so it may be difficult to do without the assistance of Agiloft Professional Services.

Any of these methods will work, so it is a question of which makes the most sense for the context in which signing will be done at your organization. This decision should be made and the methodology decided upon before embarking on using DocuSign.

Procedures for Sending Documents to DocuSign

This section describes the steps performed by an Agiloft DocuSign User (Sender) to prepare a document for e-signing, specify the signers and the signing order, preview the document at DocuSign, send out the document, and monitor the e-signing process until the document has been completed.

As was mentioned before, DocuSign is set up to process *envelopes* which are containers of documents, signer contact information, signer responsibilities, and routing (send) order specifications. This is all the information that DocuSign needs to manage and complete the requested e-signing tasks.

Ideally, the envelope structure, standard recipients, order of signing, and any custom messages will be predefined in Agiloft by configuration of the "DocuSign Action" that generates the Envelope, so starting the e-sign process can be as simple as clicking the button to create the Envelope and clicking the Send button to send it through DocuSign.

Steps for DocuSign Users (Senders)

The following Sections describe the tasks that the DocuSign User/Sender must do to create envelopes, send out documents, and monitor the e-signing process.

Specific procedures and details for each step will be provided in the following numbered Sections 1– 6:

1) Create a contract record.
2) Create a DocuSign envelope containing the document(s) in the contract record above. Also specify e-signers, responsibilities, routing information, and signing order, if not preconfigured.
3) Preview the envelope at DocuSign and make any necessary revisions.
4) Once the envelope is ready, send it out to the signers for e-signing.
5) Monitor the progress of the e-signing process in both Agiloft and DocuSign.
6) When e-signing is complete, take any additional steps needed.

1) Prepare the Contract Record

First, a word about terminology: for this discussion the term "contract document(s)" means the actual contract document(s) that will be signed by the parties involved, and which will be created either from a print template or provided by an external party.

The term "contract record" refers to the record in the Contracts table which contains all the associated information about the contract, including a link to the contract document(s) which will get created by the print template.

We'll continue to use the ABC Electronics example to make the process easier to follow and understand.

First suppose that we have a contract record for the annual customer support for ABC Electronics (the relevant part of Contracts screen is shown below in Figure 20):

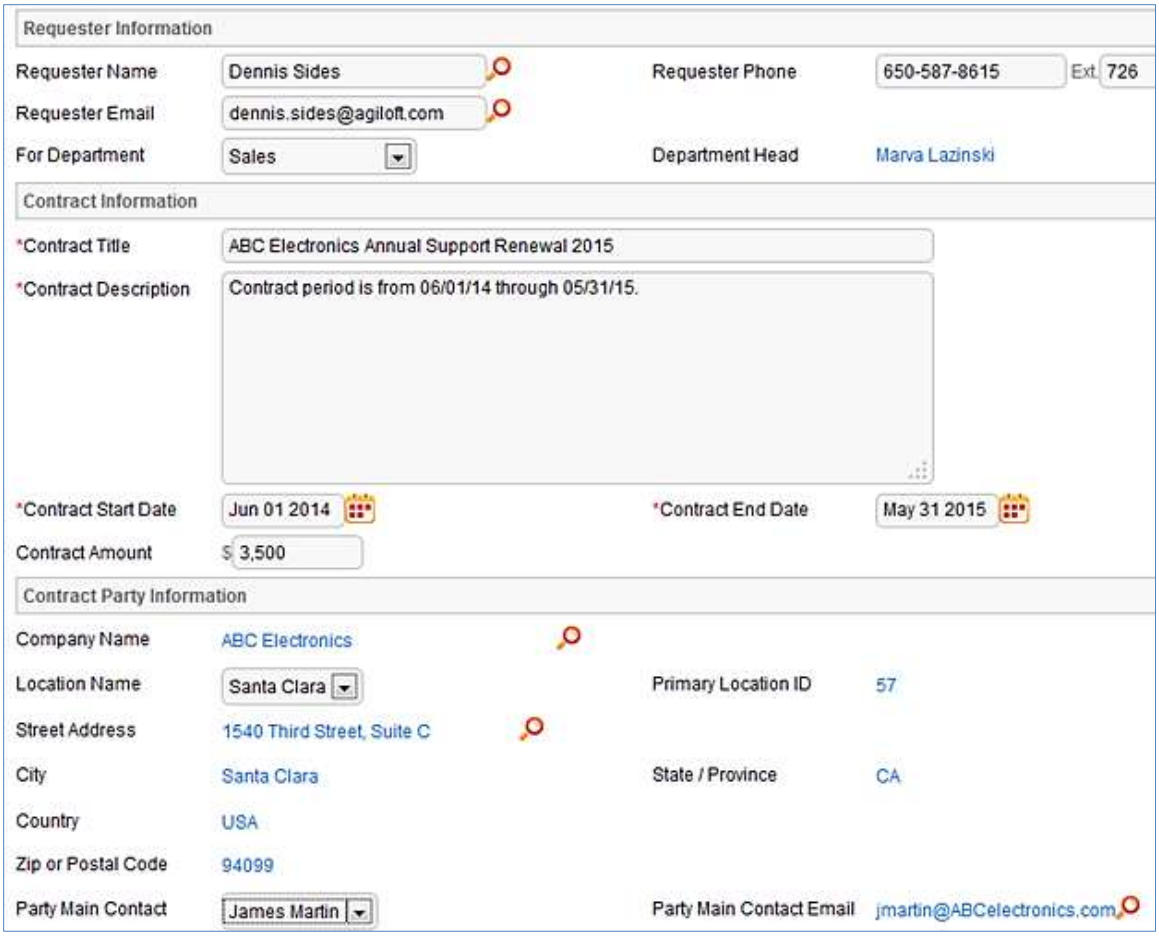


Figure 20 - Contract Record for ABC Electronics

Before we are ready to send the Contract for signatures, there may be an approval process and several versions of the Contract Document(s) that go through that process. We are omitting that entire workflow for this example, and entering the scenario at the point where all approvals have been received and the Contract Document(s) have been attached somewhere.

In our default Contracts setup, we have a Tab on the Layout called Documents with a "Create and Attach" action button that can generate the Contract Document and create an Attachment record with the attached file. Your KB may be set up differently.

However your KB is set up, to generate the document from a print template you will generally have an action button or a rule that runs on a particular print template to create an attached file in some field. In a KB dating after May 2014, by the time the contract is ready for signatures, we might have some attachments stored in a table within the Contract as follows:

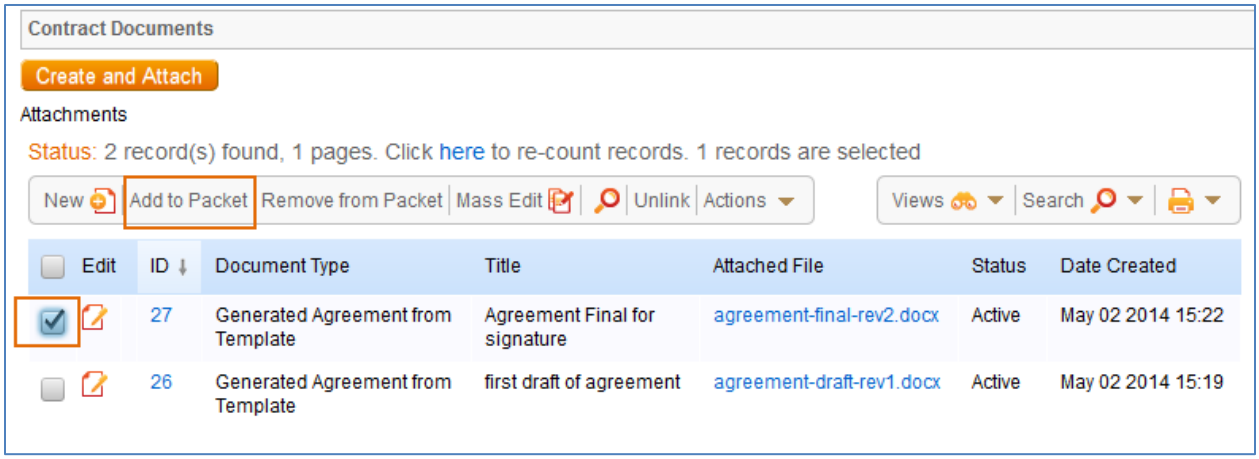


Figure 21 - Table of Attachments

Here, we are going to want to sign the final version of the Agreement and omit the earlier draft.

So once we have the final document(s) approved and ready for signature, we need a way to select just those documents to be part of the DocuSign Envelope.

This can be done in a couple of different ways:

1) Using an action button like the one above called "Add to Packet" which can be used after first selecting the desired documents in this table. That action can update a field in the Attachments record, which is then used in a filter on an Attachments field mapped to the DocuSign Envelope.

2) By giving the Sender a multivalue file field from the Attachments table and having her select the Document(s) she wants. See Figure 22 below – the field "Files to Sign" shows all Attachments for this Contract. The Sender simply selects one or more files to be included in the Envelope.

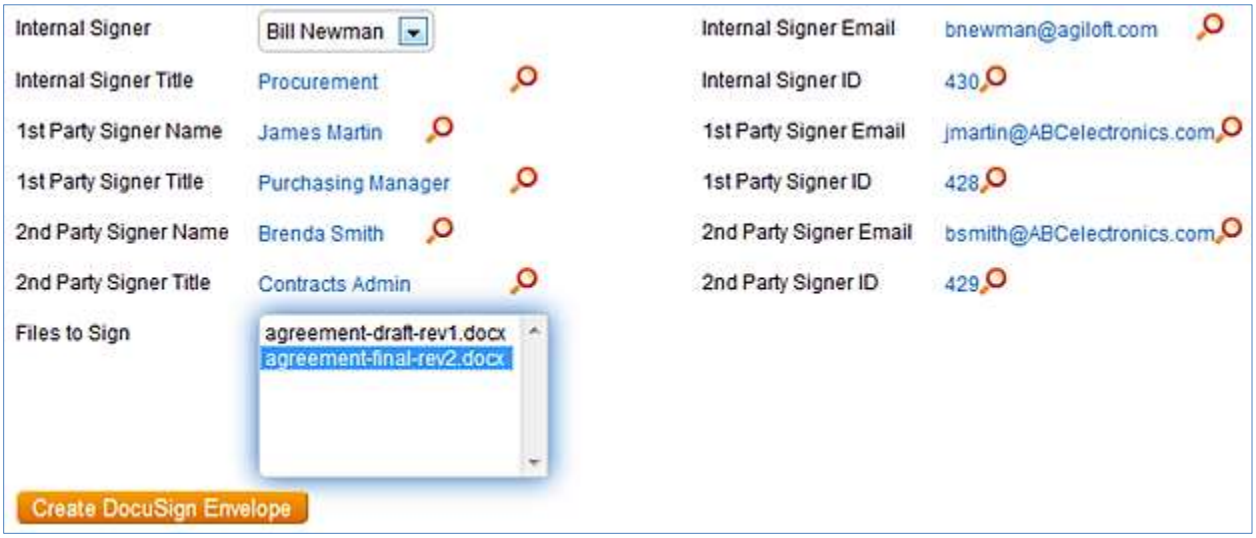


Figure 22 - Selecting Signers and Files to Sign from a List

Continuing with the ABC Electronics example, Figure 22 also shows the Signer fields on the "DocuSign Envelopes" tab of the Contract layout. By default, this is where the Signers for the Contract are selected. Remember that in the default setup we have specified one Agiloft signer (Internal Signer) and two external signers (1st/2nd Party Signers, who in this case are James and Brenda, of ABC Electronics).

To see how all this is tied together, refer back to Figure 16 which shows how the "Create DocuSign Envelope" action button was configured, which specified that there would be three signers (one internal and two external). This is why there are three Signer information blocks shown in Figure 16. Also refer to Figure 18 which shows how these signers are mapped into the contract document.

Once the Signers and Documents have been defined, it is time to generate the DocuSign Envelope.

2) CREATE A DOCUSIGN ENVELOPE

As mentioned previously, DocuSign processes *envelopes* which are containers that hold one or more documents to be e-signed by one or more email recipients, routing information for those recipients, and the order in which the e-signing is to occur.

Now click the "Create DocuSign Envelope" action button to create the entire envelope containing:

- The contract document to be signed (agreement-final-rev2.docx)
- Name and contact information for the three signers (who will be notified via email to sign)
- Signing order (Send Order) and roles (Signer, CC, etc.) for the three signers

It is worthwhile to study the relationship between Figure 23 (below) and Figure 16 to see how the fields in the envelope are populated based on the DocuSign Action that was defined.

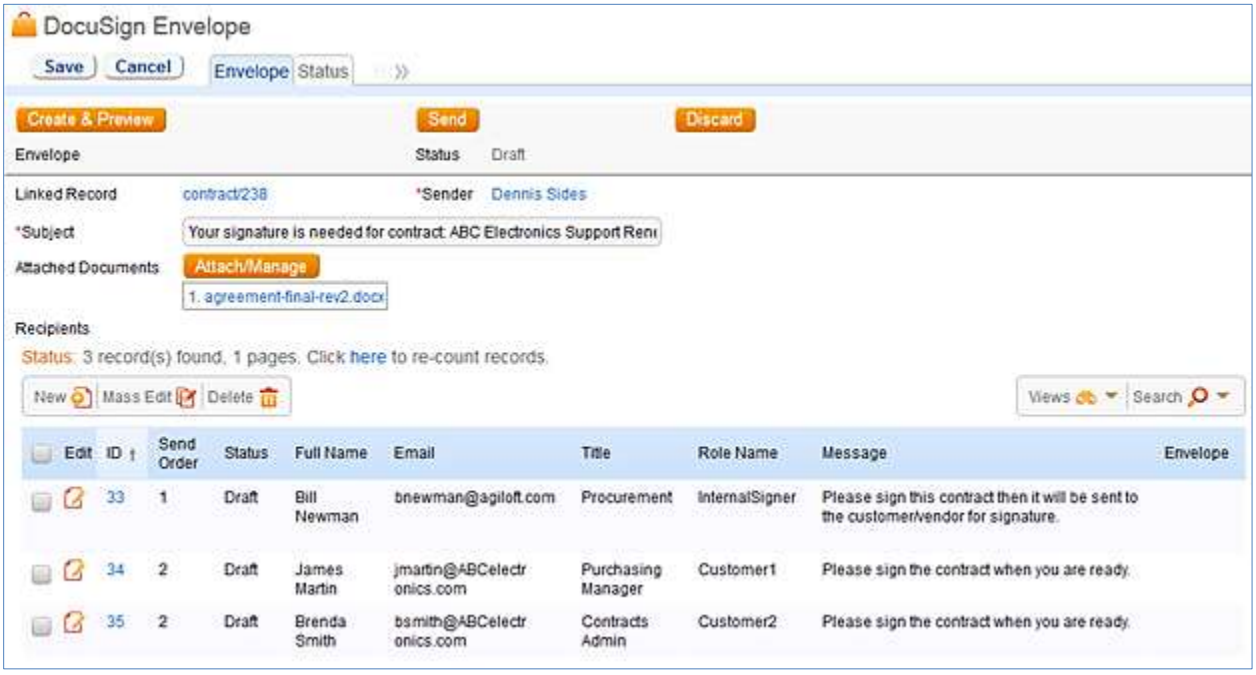


Figure 23 - DocuSign Envelope for ABC Electronics

Note that in this example the Recipient record for the second external signer (Brenda) has been modified (via the Edit icon) for parallel signing (Send Order = 2 for both James and Brenda), so either James or Brenda could sign first.

The following is a detailed explanation of the DocuSign Envelope record:

Envelope tab:

This shows the main data elements in the envelope and the three attached DocuSign Recipients records. Remember that "Recipients" are the "Signers" who will receive an email from DocuSign when it is time for them to e-sign the document.

The Figure 23 envelope defines a sequential/parallel signing order (1, 2, 2) for the signers, who will be invited to sign in this order. In this case, both external signers can sign in any order, so they both have a Send Order of 2. In the order above, the two external Signers will be notified at the same time once the Internal Signer has signed.

Remember that in the print template document the "Role Name" DocuSign metadata tag was specified as: $docusign:SignHere::InternalSigner in Figure 18, so the Role Name for Signer 1 on this screen must also be "InternalSigner".

Also remember that much of the envelope was set up via the "Create DocuSign Envelope" action button configuration in Figure 16: the email Subject line, the default email message for each signer, Send Order, etc. Most of this information can be manually modified for each recipient in the DocuSign Envelope screen, if the sender so chooses.

Recipients can also be added to the envelope at this point, if desired. Any new recipients added, however, will not have any embedded signing tags (in the document) and so the Sender will need to drag and drop the DocuSign icons onto the document before sending it. See "Self E-Signing a Document at DocuSign" at Figure 47.

To view or modify any of the DocuSign Recipient records, click on the Edit icon in the Recipients area of the DocuSign Envelope record.

For example, the sender could add a special note for the first signer in the ABC Electronics example:

Figure 24 - Add a Special Message for Signer 1

The sender could also specify additional security for any or all recipients, for example, by designating an "Access Code" which the signer would have to enter at DocuSign before gaining access to the document:

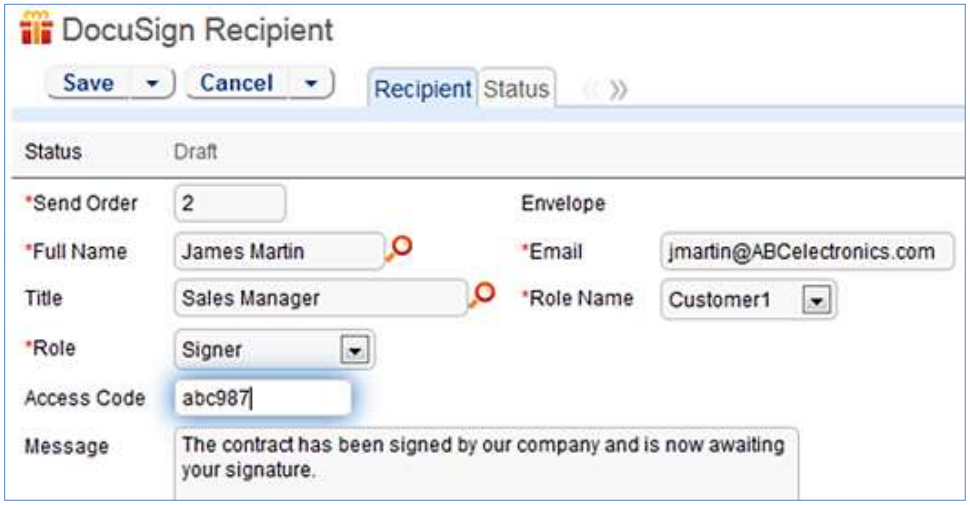


Figure 25 - Require an Access Code for Signer 2

The field definitions in the DocuSign Recipient records are as follows:

Send Order: Integer; "1" indicates first signer, "2" indicates second signer, and so on. In general, the second signer will not get access to a document until the first signer has signed, and all signers with the same Send Order will be notified at the same time when it is their turn to sign.

Envelope: Display only; this ID will be assigned automatically when the envelope is sent to DocuSign.

Full Name: First and Last Name of this signer; this may be filled in by lookup or by typing in directly.

Email: Email address of this signer; DocuSign will send signing notices to this address.

Title: May be filled in by lookup or by typing in directly. DocuSign will allow the signer to modify their title when signing, and will store that title in its address book to prompt future title entries.

Role Name: This is one of the entries in the DocuSign Roles table, and it must match exactly the last field of the DocuSign metadata tag in the contract document – for the example in Figure 23, the tags are $docusign:SignHere::Customer1 (for James), and $docusign:SignHere::Customer2 (for Brenda). DocuSign will place a "Sign Here" icon in the document where each person should sign.

Role: This is what the recipient is supposed to do. These values are taken from DocuSign's Roles and should not be changed. The dropdown choices are:

- Signer: Recipient is requested to e-sign the document.
- CC: Recipient is not a signer and will only receive a Courtesy Copy of the document.
- Certified Delivery: Recipient will be emailed a certified copy of the document.
- Agent: Sender creates "placeholder" Recipient records, but the Agent will fill in the actual name and email address of the actual signers.
- Editor: Recipient can modify the envelope to add signers, documents, etc.

Access Code: This is an optional security feature. If the sender enters something here, DocuSign will request that signer to input this Access Code before getting access to the document – for enhanced security it's probably better to convey this code another way than in an email.

Message: This field is populated with the default email message in the DocuSign Envelope Action and may be modified for each recipient by the sender.

The DocuSign Envelope and DocuSign Recipient records also have a Status tab which will be updated by DocuSign if during the initial DocuSign Deployment (Figure **8**) the field "Accept Real-Time Updates" was specified "Yes." As signers progress through the e-signing process, DocuSign will post status updates indicating the latest actions taken by signers.

Figure 26 - DocuSign Envelope Status Tab

A record is created in the Agiloft table DocuSign Recipients for each signer of the contract. By default, the DocuSign Recipients table does not appear on the left pane in Agiloft – it is generally accessed through the DocuSign Envelopes record in the Contracts Table. When all Recipients have been entered into the Envelope record above in Figure 23, the envelope is complete. The $docusign:xxx metadata tags have ideally already been inserted into the attached document and rendered into the signing tags that DocuSign will display for the signers.

Once the DocuSign Envelope record (Figure 23) and the DocuSign Recipient records (Figure 24 and Figure 25) are complete, the Sender now has three choices:

- "Send" will send the envelope to DocuSign with no further interaction. From there, DocuSign will immediately send an email notification to the first signer(s).
- "Create & Preview" will send the envelope to DocuSign and allow the sender to check the document at DocuSign and preview the signing tags that each signer will see. If any changes need to be made, the sender will be able to make them at that time (described in more detail in the next section).
- "Discard" will delete the envelope and Recipients from Agiloft and nothing will get sent to DocuSign.

With the "Create & Preview" choice, the sender has the option to use the DocuSign interface to manually insert the signing tags. He/she could attach a "plain" document (without the Agiloft metadata tags) to the envelope, specify at least one signer, and click "Create & Preview". Additional signers could

be added at DocuSign and the “drag & drop” functionality could then be used to add the signing tags for each signer. This will be outlined in a later section “Additional Functionality at DocuSign.”

This is probably the preferred approach when working with a Document that has been provided in pdf format or by an outside party.

3) Preview the Document at DocuSign to Check the Tags

The envelope can either be sent to DocuSign from the DocuSign Envelope screen above (Figure 23) or from the Contract screen (DocuSign Envelopes tab) shown below, by clicking the Create & Preview or Send buttons:

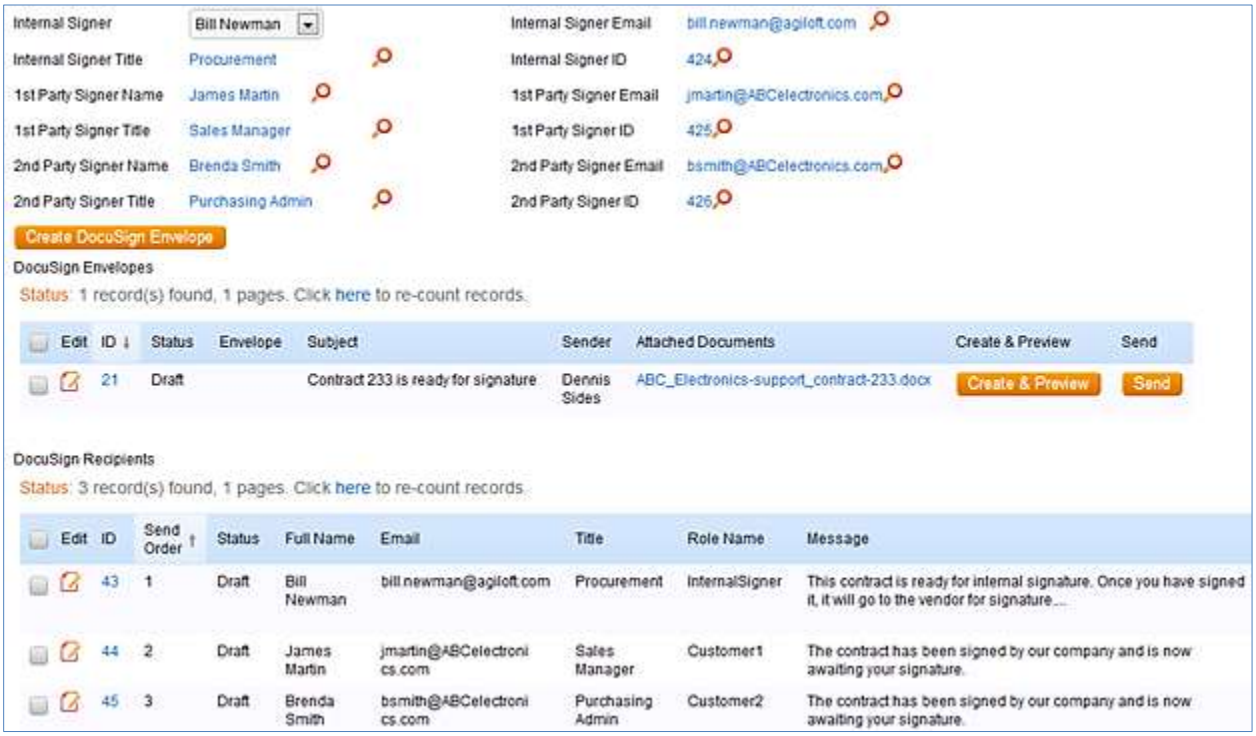

Internal Signer
Bill Newman
Internal Signer Email
bill.newman@agiloft.com
Internal Signer Title
Procurement
Internal Signer ID
424
1st Party Signer Name
James Martin
1st Party Signer Email
jmartin@ABCelectronics.com
1st Party Signer Title
Sales Manager
1st Party Signer ID
425
2nd Party Signer Name
Brenda Smith
2nd Party Signer Email
bsmith@ABCelectronics.com
2nd Party Signer Title
Purchasing Admin
2nd Party Signer ID
426
Create DocuSign Envelope
DocuSign Envelopes
Status: 1 record(s) found, 1 pages. Click here to re-count records.
Edit ID Status Envelope Subject Sender Attached Documents Create & Preview Send
21 Draft Contract 233 is ready for signature Dennis Sides ABC_Electronics-support_contract-233.docx Create & Preview Send
DocuSign Recipients
Status: 3 record(s) found, 1 pages. Click here to re-count records.
Edit ID Send Order Status Full Name Email Title Role Name Message
43 1 Draft Bill Newman bill.newman@agiloft.com Procurement InternalSigner This contract is ready for internal signature. Once you have signed it, it will go to the vendor for signature...
44 2 Draft James Martin jmartin@ABCelectronics.com Sales Manager Customer1 The contract has been signed by our company and is now awaiting your signature.
45 3 Draft Brenda Smith bsmith@ABCelectronics.com Purchasing Admin Customer2 The contract has been signed by our company and is now awaiting your signature.

Figure 27 - Completed DocuSign Envelope

Clicking “Send” doesn’t require or allow any further interaction by the sender. Clicking “Create & Preview” takes the sender to the DocuSign website where he/she can review the document, verify and/or modify the intended recipients, revise Roles or Sending Order, and check/modify the signing tags for each recipient.

If templates had also been set up at DocuSign, the sender might see the screen below if the document in the envelope matches (to a configurable degree) an existing DocuSign template. DocuSign templates define entire envelopes – the document(s), signing tags, recipient information, and signing order. This will be outlined later in the “Additional Functionality at DocuSign” chapter.

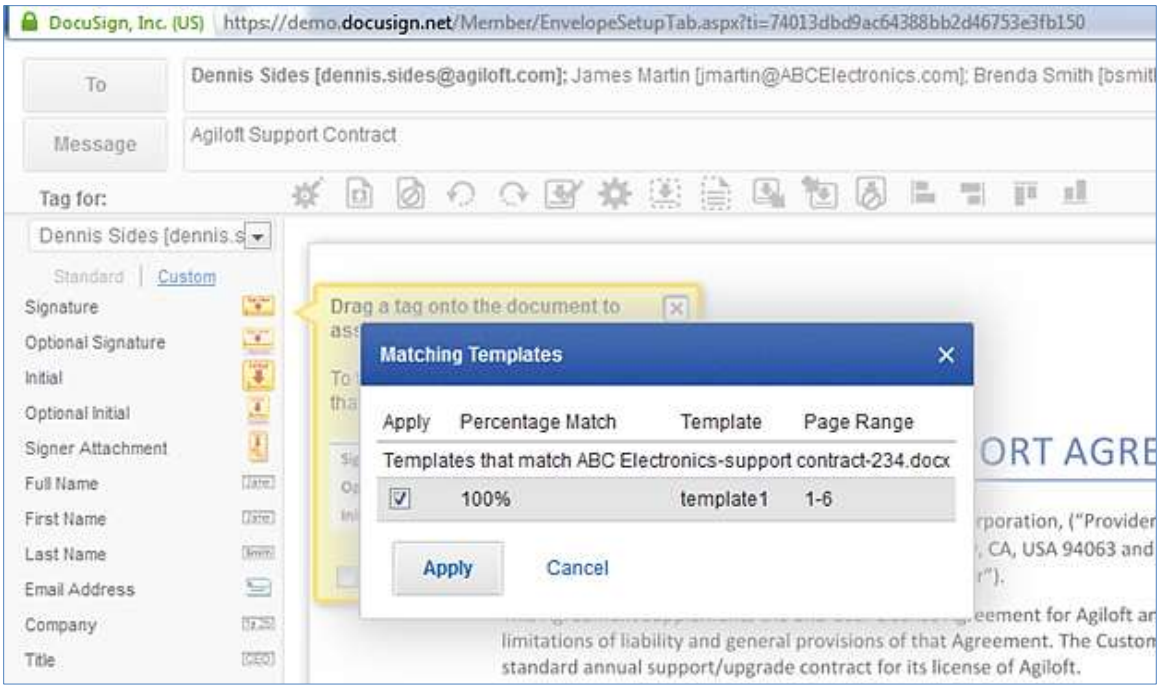


Figure 28 - Use DocuSign Matching Template?

In this case, the sender has already created a complete envelope in Agiloft with all the desired information, so he'll click "Cancel" to use his own envelope. Clicking "Apply" would have used the DocuSign template instead of the envelope from the sender.

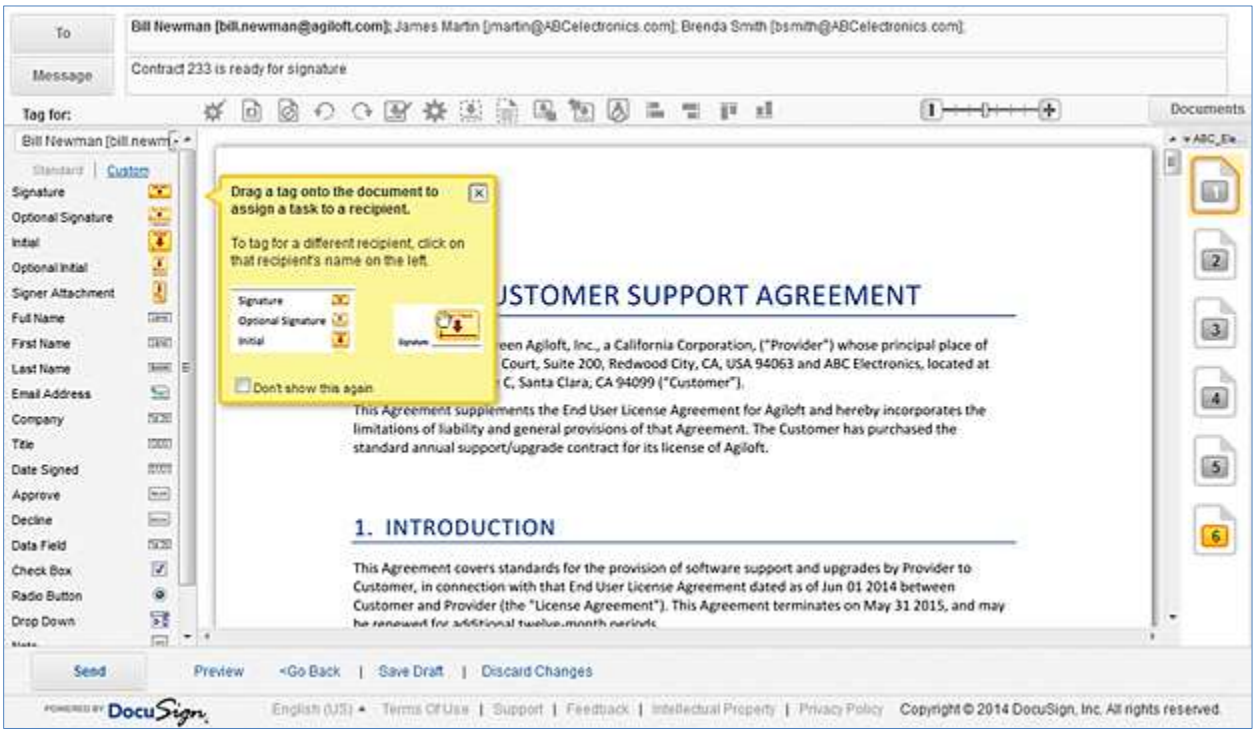

To
Bill Newman [bill.newman@agiloft.com]; James Martin [jmartin@ABCelectronics.com]; Brenda Smith [bsmith@ABCelectronics.com]
Message
Contract 233 is ready for signature
Tag for:
Documents
Standard | Custom
Signature
Optional Signature
Initial
Optional Initial
Signer Attachment
Full Name
First Name
Last Name
Email Address
Company
Title
Date Signed
Approve
Decline
Data Field
Check Box
Radio Button
Drop Down
Drag a tag onto the document to assign a task to a recipient.
To tag for a different recipient, click on that recipient's name on the left.
Don't show this again
USTOMER SUPPORT AGREEMENT
This Agreement supplements the End User License Agreement for Agiloft and hereby incorporates the limitations of liability and general provisions of that Agreement. The Customer has purchased the standard annual support/upgrade contract for its license of Agiloft.
1. INTRODUCTION
This Agreement covers standards for the provision of software support and upgrades by Provider to Customer, in connection with that End User License Agreement dated as of Jun 01 2014 between Customer and Provider (the "License Agreement"). This Agreement terminates on May 31 2015, and may
Send
Preview
<Go Back
Save Draft
Discard Changes
DocuSign
English (US)
Terms Of Use
Support
Feedback
Intellectual Property
Privacy Policy
Copyright © 2014 DocuSign, Inc. All rights reserved.

Figure 29 - DocuSign Review

Figure 29 shows the document being reviewed at DocuSign. Along the right are the page number icons for this 6-page document. Pages with a yellow icon indicate that there are signing tags there. Along the

left are the various signing tags that can be dropped onto the document. The “Tag for:” dropdown in the upper left will indicate which signer is assigned the tags which are currently highlighted. Here the sender can check that the tags are assigned to each signer, reposition the tags if necessary, verify that each tag is referencing the proper Agiloft $docusign:xxx field, reformat or delete the tag, etc.

In the screen below we’ll first examine the tags for the InternalSigner, in this case, Bill Newman:

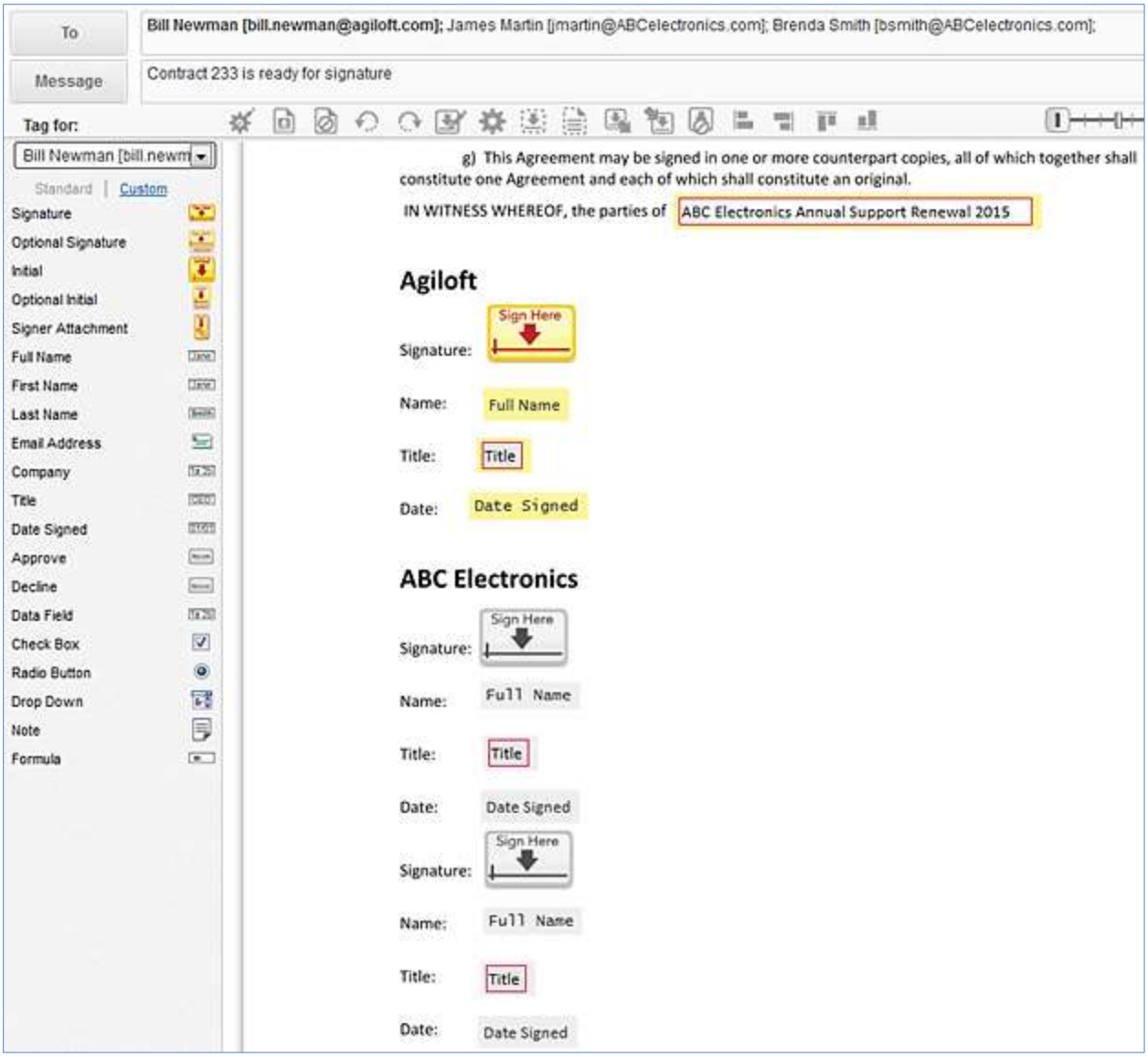


Figure 30 - DocuSign Signing Tag Review

The signing tags are illuminated for each signer as the signers get selected in the “Tag for:” dropdown. Note that only actual signers will appear in the “Tag for:” dropdown. Any tag can be expanded by clicking on it:

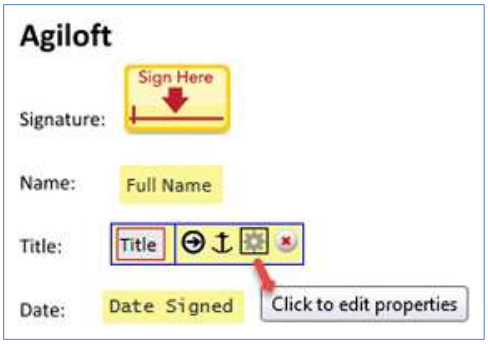


Figure 31 - Signing Tags at DocuSign

Select the person whose tags you want to review by clicking on their name in the upper left "Tag for:" dropdown. Those tags will then be displayed in yellow. Clicking on each tag (in this example Bill Newman's "Title" tag) will reveal an information box with up to four icons:

- (right arrow) – click this arrow to expand the display field (not present for signature icons)
- (anchor symbol) – hover over this to display the field this tag is anchored to
- (X inside circle) – delete this tag
- (gear symbol) – click on this to edit the properties of the field:

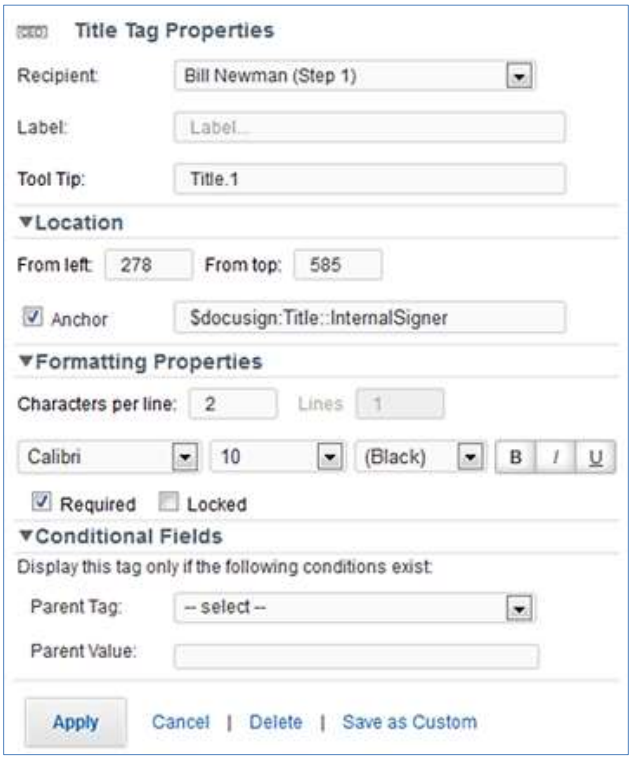


Figure 32 – Signing Tag Properties

Note that by clicking and holding any tag you can reposition it. Repositioning can also be done by clicking a tag and then pressing the arrow keys. In addition you can change any of the information listed in the Tag Properties box above.

Adding Tags

If working with a document that was not generated from a Print Template in Agiloft and that therefore has no pre-existing Tags, the Sender can use this same preview screen to add all of the necessary Tags. The process is to select each signer from the dropdown box in the upper left and then proceed through the document(s) to locate each place where some action has been requested for that signer.

The sender clicks on the appropriate tag (displayed in the left pane), drags it to the desired location, and drops it onto the document. The sender proceeds until all of that signer's tags have been inserted. Then the sender selects the next signer from the dropdown and proceeds in like manner until all tags for all signers have been inserted into the document.

The sender can click "Preview" at the bottom of the screen and view the document as each signer will see it. Signers are selected in turn by the upper left dropdown.

4) Send Out the Document for E-Signing

After the sender has examined the document, verified signer information and routing order, previewed the signing tags for each signer, repositioned any tags (via click and drag), and/or made any necessary modifications to the tags, the sender has these five choices which are listed at the bottom of the DocuSign "review screen" (Figure 29*)* above:

Preview: Shows the document as each signer will see it, in order (only tags for them will be shown)

<Go Back: Takes you back to the previous screen (or to the envelope, Figure 33 below)

Discard Changes: Discards any changes you made during envelope review

Send: Click the "Send" button on the bottom left of the DocuSign screen to begin the e-signing process. If the sender is the same person as the first signer he/she will be asked: "Would you like to sign your envelope now? (yes/no)."

Save Draft: (in DocuSign envelope template format) This option will save the envelope in the sender's Draft folder, and it can be reexamined at another time. Bringing up the Draft copy will display the envelope screen below (Figure 33). Note the signing order diagram that can be displayed by clicking Order Diagram. From this Draft display you have these options:

- Next – takes you back into the document in review mode
- Send Now – sends out the envelope
- Save Draft – saves any changes you made during this editing phase
- Discard Changes – discards any changes you made during this editing phase

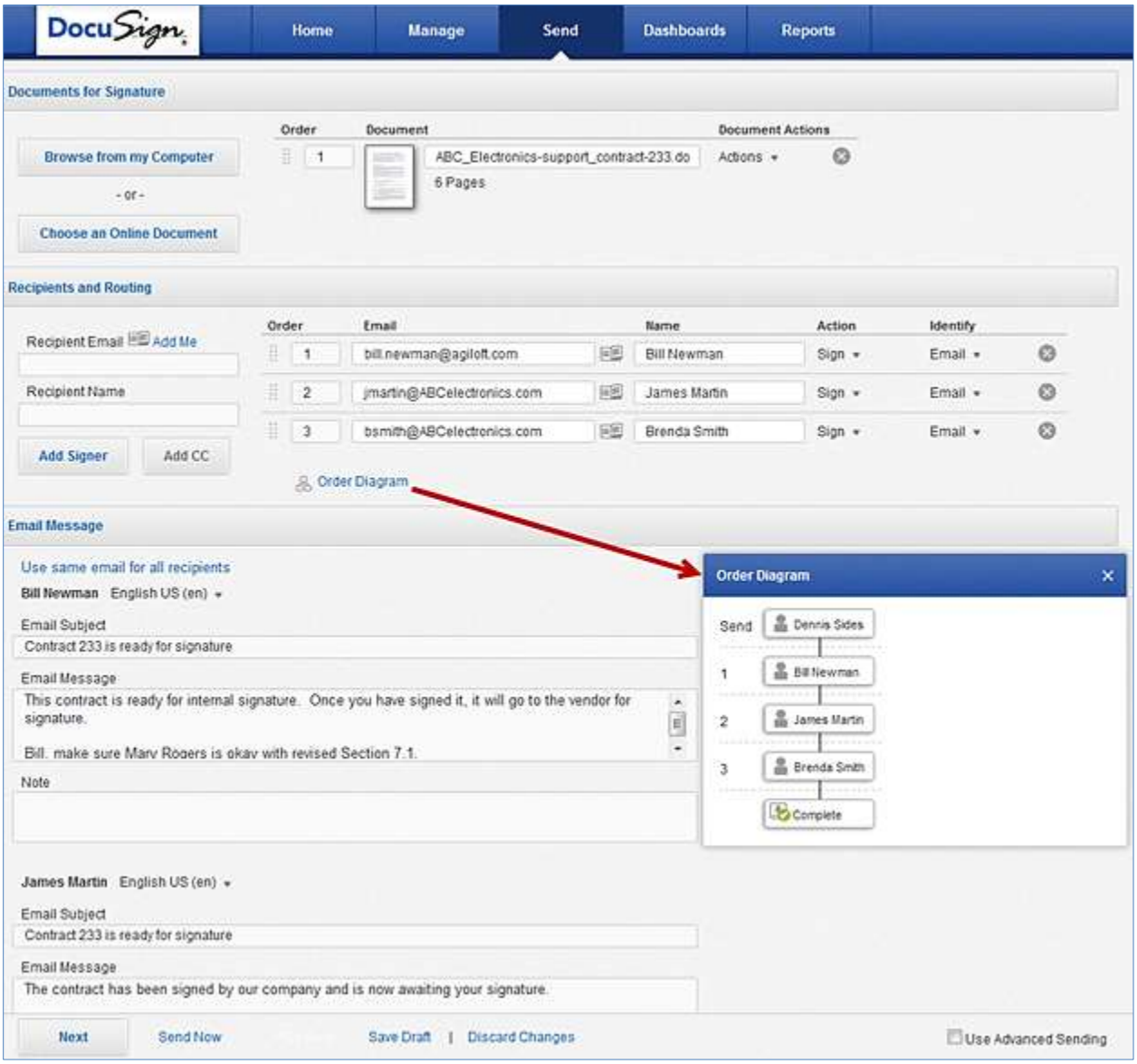


Figure 33 - DocuSign Envelope

The envelope contains all the signer information that was created in Agiloft: (name, email address, email subject/message, signing order, etc.). Note that by clicking on the “Order Diagram” box, a visual display will appear. The display can be dragged to a more convenient place if information is being overlaid.

Once the document has been sent out, the “action” shifts to the signers (see the following section, “Procedures for E-Signing at DocuSign” on Page 56). However, the sender can continue to monitor the process by using the tools described in the next Section.

5) Monitor the E-Signing Process

By default, the sender receives an email from DocuSign as each person views the document. The sender and any persons who have signed the document receive an email notification if any subsequent signer declines or reassigns their signing to another person.

There is current historical information available both within Agiloft and at DocuSign. In Agiloft go to the DocuSign Envelopes table, select the desired envelope, and then click on the Status tab to see summary information similar to the screenshot below:

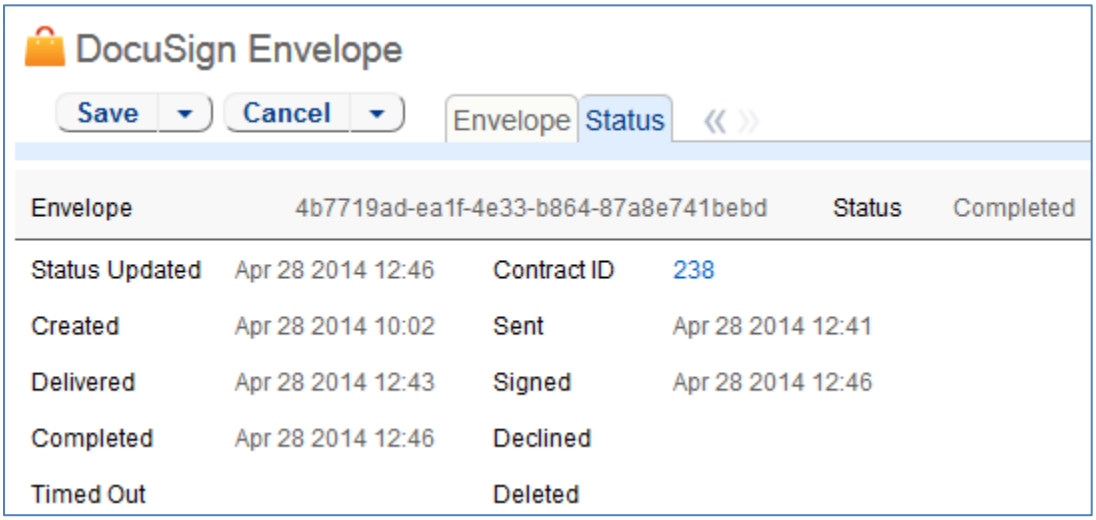

DocuSign Envelope
Save
Cancel
Envelope
Status
Envelope 4b7719ad-ea1f-4e33-b864-87a8e741bebd Status Completed
Status Updated Apr 28 2014 12:46 Contract ID 238
Created Apr 28 2014 10:02 Sent Apr 28 2014 12:41
Delivered Apr 28 2014 12:43 Signed Apr 28 2014 12:46
Completed Apr 28 2014 12:46 Declined
Timed Out Deleted

Figure 34 - Agiloft Envelope Status

There are also detailed status, summary, and historical records kept at DocuSign. These are described in the following Section “(6)

E-Signing Completion."

Note that during the signing process it may be necessary for the sender to make corrections to the envelope and/or document. To accomplish this the sender can highlight the envelope at DocuSign on the "Manage" tab, click on "Actions" at the upper right, and click "Correct" to be taken to the envelope where changes could be made, say, adding another signer.

If changes need to be made to the signing tags, click "Edit Documents and Tags" at the bottom. However, note that no changes can be made to the actual document text itself and that tags can only be edited for signers who have not yet processed the document. To complete the action, click "Correct" to save the changes or "Discard Changes" to discard. Then click "Resend" in the "Actions" dropdown to send on to the next recipients (see Figure 35 below).

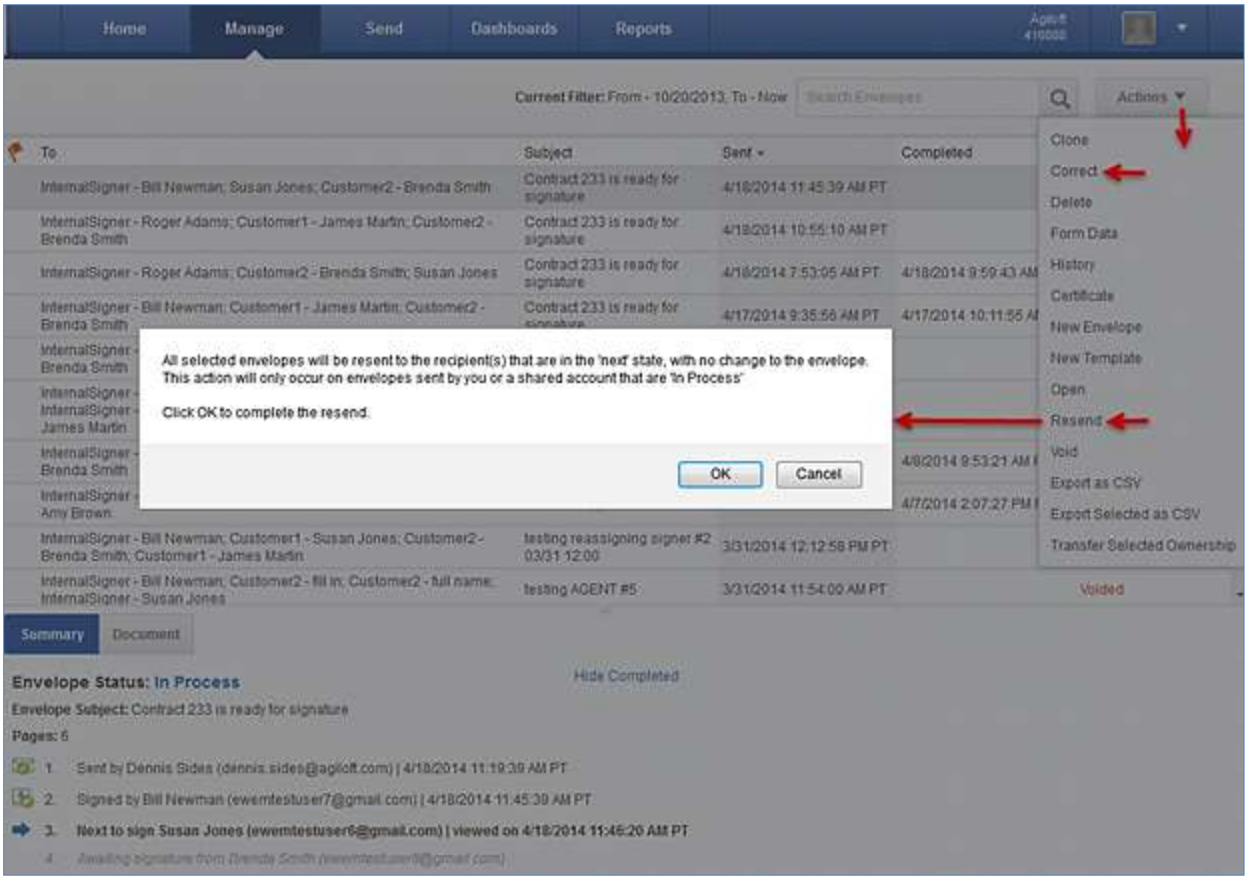


Figure 35 - Making Envelope Corrections

6) E-SIGNING COMPLETION

When all signers have completed their signing duties, the sender will receive a confirmation email from DocuSign which also contains a pdf of the document with all e-signatures and all metadata fields filled in. At this point the document is complete and can be filed by the sender and sent along for any further processing as dictated by the company's contract management protocols.

At DocuSign there are many summary and historical displays that can be accessed either from within a document via the "More" button at the upper right or by going to the envelope "Manage" display and clicking the "Actions" button on the upper right:

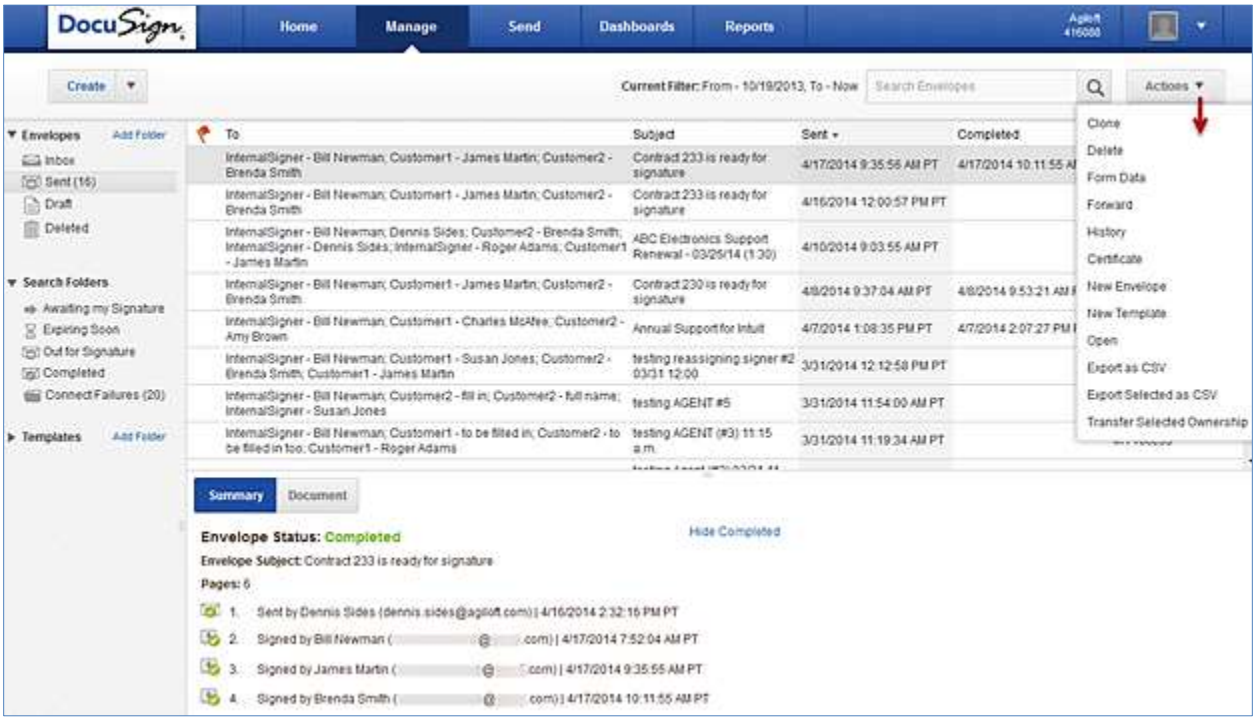
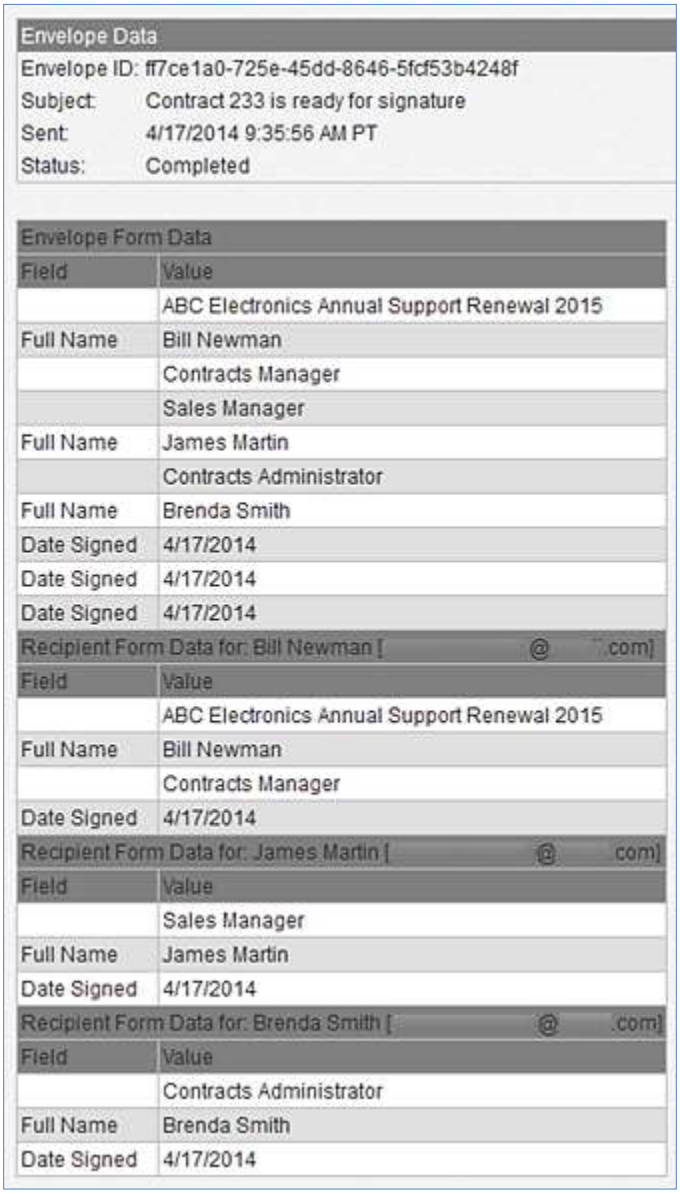

DocuSign
Home
Manage
Send
Dashboards
Reports
Create
Current Filter: From - 10/19/2013, To - Now
Actions
Clone
Delete
Form Data
Forward
History
Certificate
New Envelope
New Template
Open
Export as CSV
Export Selected as CSV
Transfer Selected Ownership
Envelopes
Add Folder
Inbox
Sent (16)
Draft
Deleted
Search Folders
Awaiting my Signature
Expiring Soon
Out for Signature
Completed
Connect Failures (20)
Templates
Add Folder
To
Subject
Sent
Completed
InternalSigner - Bill Newman; Customer1 - James Martin; Customer2 - Brenda Smith
Contract 233 is ready for signature
4/17/2014 9:35:56 AM PT
4/17/2014 10:11:55 AM
InternalSigner - Bill Newman; Customer1 - James Martin; Customer2 - Brenda Smith
Contract 233 is ready for signature
4/16/2014 12:00:57 PM PT
InternalSigner - Bill Newman; Dennis Sides; Customer2 - Brenda Smith; InternalSigner - Dennis Sides; InternalSigner - Roger Adams; Customer1 - James Martin
ABC Electronics Support Renewal - 03/25/14 (1:30)
4/10/2014 9:03:55 AM PT
InternalSigner - Bill Newman; Customer1 - James Martin; Customer2 - Brenda Smith
Contract 230 is ready for signature
4/8/2014 9:37:04 AM PT
4/8/2014 9:53:21 AM
InternalSigner - Bill Newman; Customer1 - Charles McAfee; Customer2 - Amy Brown
Annual Support for Intuit
4/7/2014 1:08:35 PM PT
4/7/2014 2:07:27 PM
InternalSigner - Bill Newman; Customer1 - Susan Jones; Customer2 - Brenda Smith; Customer1 - James Martin
testing reassigning signer #2 03/31 12:00
3/31/2014 12:12:58 PM PT
InternalSigner - Bill Newman; Customer2 - fill in; Customer2 - full name; InternalSigner - Susan Jones
testing AGENT #5
3/31/2014 11:54:00 AM PT
InternalSigner - Bill Newman; Customer1 - to be filled in; Customer2 - to be filled in too; Customer1 - Roger Adams
testing AGENT (#3) 11:15 a.m.
3/31/2014 11:19:34 AM PT
Summary
Document
Envelope Status: Completed
Hide Completed
Envelope Subject: Contract 233 is ready for signature
Pages: 6
1. Sent by Dennis Sides (dennis.sides@agilsoft.com) | 4/16/2014 2:32:16 PM PT
2. Signed by Bill Newman (@ .com) | 4/17/2014 7:52:04 AM PT
3. Signed by James Martin (@ .com) | 4/17/2014 9:35:55 AM PT
4. Signed by Brenda Smith (@ .com) | 4/17/2014 10:11:55 AM PT

Figure 36 - Document Actions Options

The envelope “Form Data” display is as follows:



Envelope Data	
Envelope ID:	ff7ce1a0-725e-45dd-8646-5fcf53b4248f
Subject:	Contract 233 is ready for signature
Sent:	4/17/2014 9:35:56 AM PT
Status:	Completed

Envelope Form Data	
Field	Value
	ABC Electronics Annual Support Renewal 2015
Full Name	Bill Newman
	Contracts Manager
	Sales Manager
Full Name	James Martin
	Contracts Administrator
Full Name	Brenda Smith
Date Signed	4/17/2014
Date Signed	4/17/2014
Date Signed	4/17/2014
Recipient Form Data for: Bill Newman [@ .com]	
Field	Value
	ABC Electronics Annual Support Renewal 2015
Full Name	Bill Newman
	Contracts Manager
Date Signed	4/17/2014
Recipient Form Data for: James Martin [@ com]	
Field	Value
	Sales Manager
Full Name	James Martin
Date Signed	4/17/2014
Recipient Form Data for: Brenda Smith [@ .com]	
Field	Value
	Contracts Administrator
Full Name	Brenda Smith
Date Signed	4/17/2014

Figure 37 - DocuSign Form Data

The envelope “History” display is as follows:

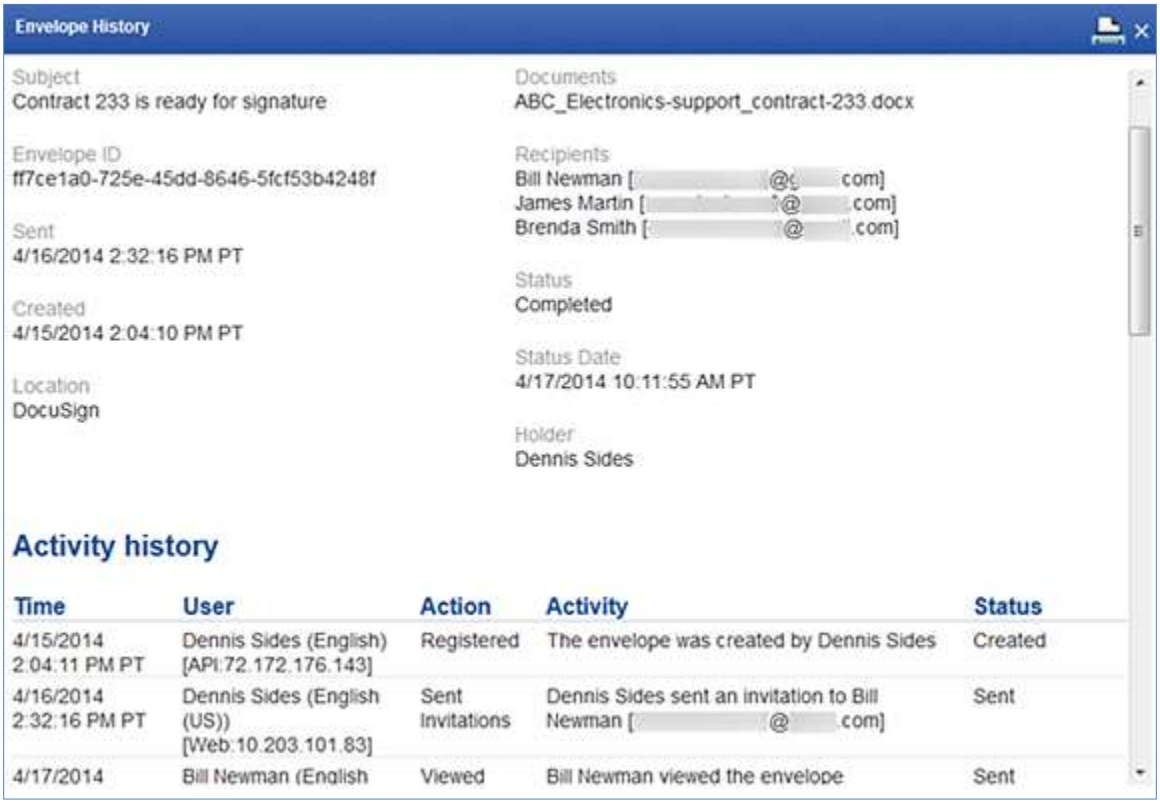
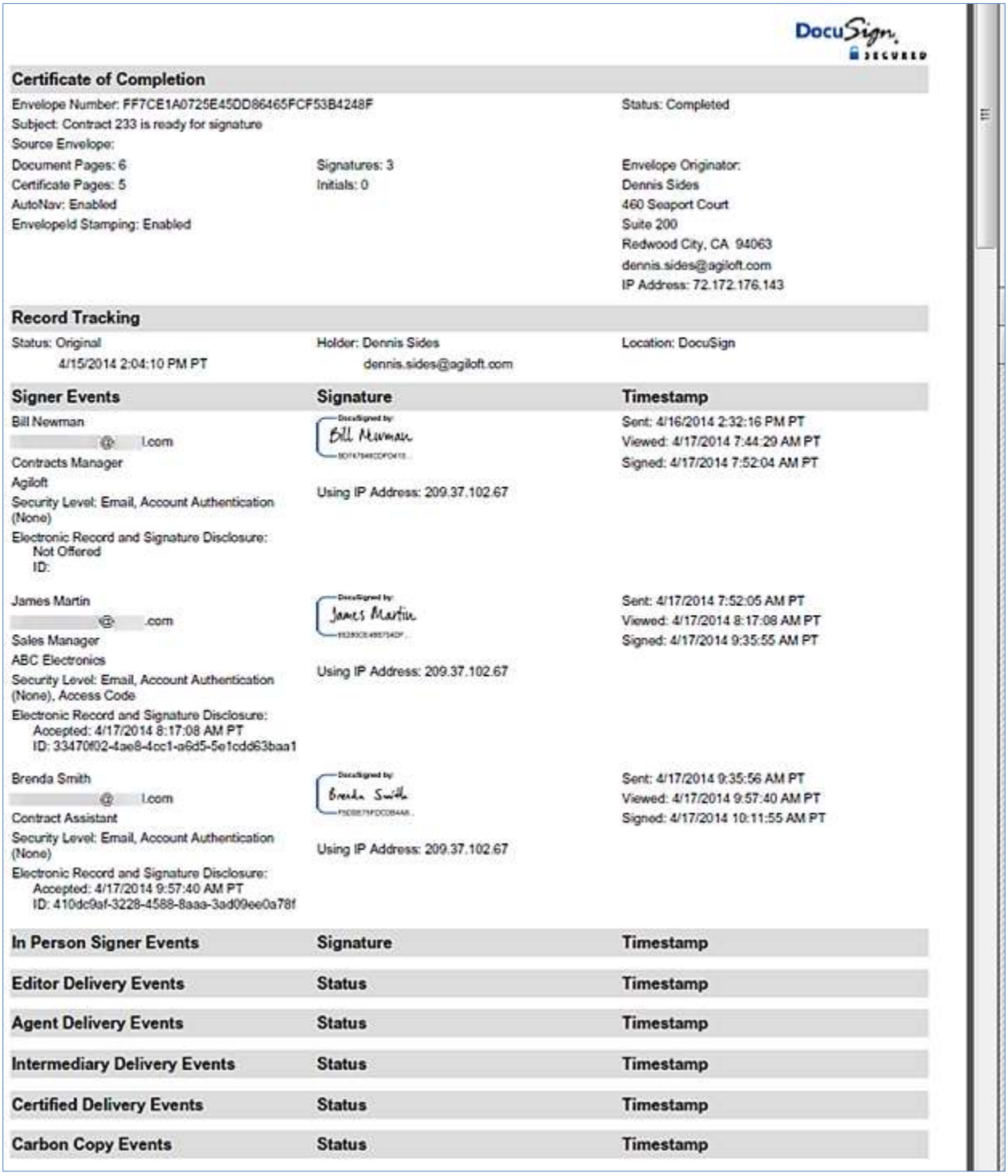


Figure 38 - DocuSign Envelope History

This will show every action taken on the envelope in sequential order and is a more complete picture of the signing process than the envelope status display in Agiloft. This display will not be created until the envelope has been sent to the first signer.

The envelope “Certificate of Completion” display is as follows:



DocuSign SECURED

Certificate of Completion

Envelope Number: FF7CE1A0725E45OD86465FCF53B4248F
Subject: Contract 233 is ready for signature
Source Envelope:
Document Pages: 6
Certificate Pages: 5
AutoNav: Enabled
EnvelopeId Stamping: Enabled

Signatures: 3
Initials: 0

Status: Completed

Envelope Originator:
Dennis Sides
460 Seaport Court
Suite 200
Redwood City, CA 94063
dennis.sides@agiloft.com
IP Address: 72.172.176.143

Record Tracking

Status: Original
4/15/2014 2:04:10 PM PT

Holder: Dennis Sides
dennis.sides@agiloft.com

Location: DocuSign

Signer Events	Signature	Timestamp
Bill Newman [redacted]@[redacted].com Contracts Manager Agiloft Security Level: Email, Account Authentication (None) Electronic Record and Signature Disclosure: Not Offered ID:	DocuSigned by: Bill Newman Using IP Address: 209.37.102.67	Sent: 4/16/2014 2:32:16 PM PT Viewed: 4/17/2014 7:44:29 AM PT Signed: 4/17/2014 7:52:04 AM PT
James Martin [redacted]@[redacted].com Sales Manager ABC Electronics Security Level: Email, Account Authentication (None), Access Code Electronic Record and Signature Disclosure: Accepted: 4/17/2014 8:17:08 AM PT ID: 33470f02-4ae8-4cc1-a6d5-5e1cdd63baa1	DocuSigned by: James Martin Using IP Address: 209.37.102.67	Sent: 4/17/2014 7:52:05 AM PT Viewed: 4/17/2014 8:17:08 AM PT Signed: 4/17/2014 9:35:55 AM PT
Brenda Smith [redacted]@[redacted].com Contract Assistant Security Level: Email, Account Authentication (None) Electronic Record and Signature Disclosure: Accepted: 4/17/2014 9:57:40 AM PT ID: 410dc9af-3228-4588-8aaa-3ad09ee0a78f	DocuSigned by: Brenda Smith Using IP Address: 209.37.102.67	Sent: 4/17/2014 9:35:56 AM PT Viewed: 4/17/2014 9:57:40 AM PT Signed: 4/17/2014 10:11:55 AM PT

In Person Signer Events	Signature	Timestamp
Editor Delivery Events	**Status**	**Timestamp**
Agent Delivery Events	**Status**	**Timestamp**
Intermediary Delivery Events	**Status**	**Timestamp**
Certified Delivery Events	**Status**	**Timestamp**
Carbon Copy Events	**Status**	**Timestamp**

Figure 39 - DocuSign Certificate of Completion

PROCEDURES FOR E-SIGNING AT DOCUSIGN

The previous section showed how an Agiloft DocuSign User/Sender creates an envelope for e-signing by preparing a document or template, identifying the signers, and specifying a signing order. As demonstrated, the sender has complete control and oversight of the e-signing process from start to finish.

This section describes the duties and options available to the document e-signers. To aid in user understanding we'll continue with our original example of the Agiloft support contract for ABC Electronics. As you recall, this contract calls for three signers – one from Agiloft and two from ABC.

Note that the sender needs to be set up as a DocuSign User by a DocuSign account administrator. The signers of the document can be, but do not need to be, registered on their company's DocuSign account.

The process for signers is as follows:

- Respond to a notification email by clicking on the "Review Document" link.
- Enter the access code or any other security measures specified by the sender (if any).
- Create or choose a signature style (first time only).
- Review the document, e-sign, and provide any other signing information as requested. The signer can also defer or decline signing, or specify someone else to be the signer.
- Each signer will get a pdf copy of the document with signing information up to that point.
- When signing is complete, the sender and all signers receive an email with the completed pdf document link which can be used to save the document locally.
- The email notification logic can be adjusted at DocuSign by the account administrator to avoid getting emails on every change to the envelope. See Figure 51 below.

DocuSign displays all documents within an envelope as one file, with page number tabs along the right for easy navigation within the envelope and a white space in between each document. In this example, there is only one document in the envelope.

The signer is taken into the document(s) and is led to each of the places within the document(s) that have been specified as requiring their input (indicated by yellow tabs along the left). The signer can also move about and review any parts of the document(s) they desire to see.

Also note that while on the DocuSign website the signer has access to all the extensive Help information available there.

While reviewing the document, the signer can click "More" to see additional options, which include the original options available in the notification email (Change Signer, Decline, Sign on Paper, Finish Later) as well as View (Envelope) History, View Certificate, View Form Data, and View Consumer Disclosure. These were described at the end of the previous Section "E-Signing Completion."

When the signer has reviewed the document and all requested fields have been completed, a message window is displayed stating "All required fields complete" and the signer is asked to confirm their signing by clicking on the "Confirm Signing" tab on the left. After that, the document is emailed to the next signer (if any).

When all specified recipients have completed their e-signing, the original sender gets an email notification with an attached pdf of the fully-signed document. If a recipient has added other signers, DocuSign manages the process just as if all signers had been explicitly specified originally.

NOTIFICATION EMAIL FROM DOCUSIGN

Each signer of the document will receive in turn an email notification from DocuSign that a document is available for their electronic signature (see Figure 40 below). The signer clicks on the "View Documents" button and is taken to the DocuSign website for the actual e-signing.

In the ABC Electronics example, the first signer is Bill Newman:

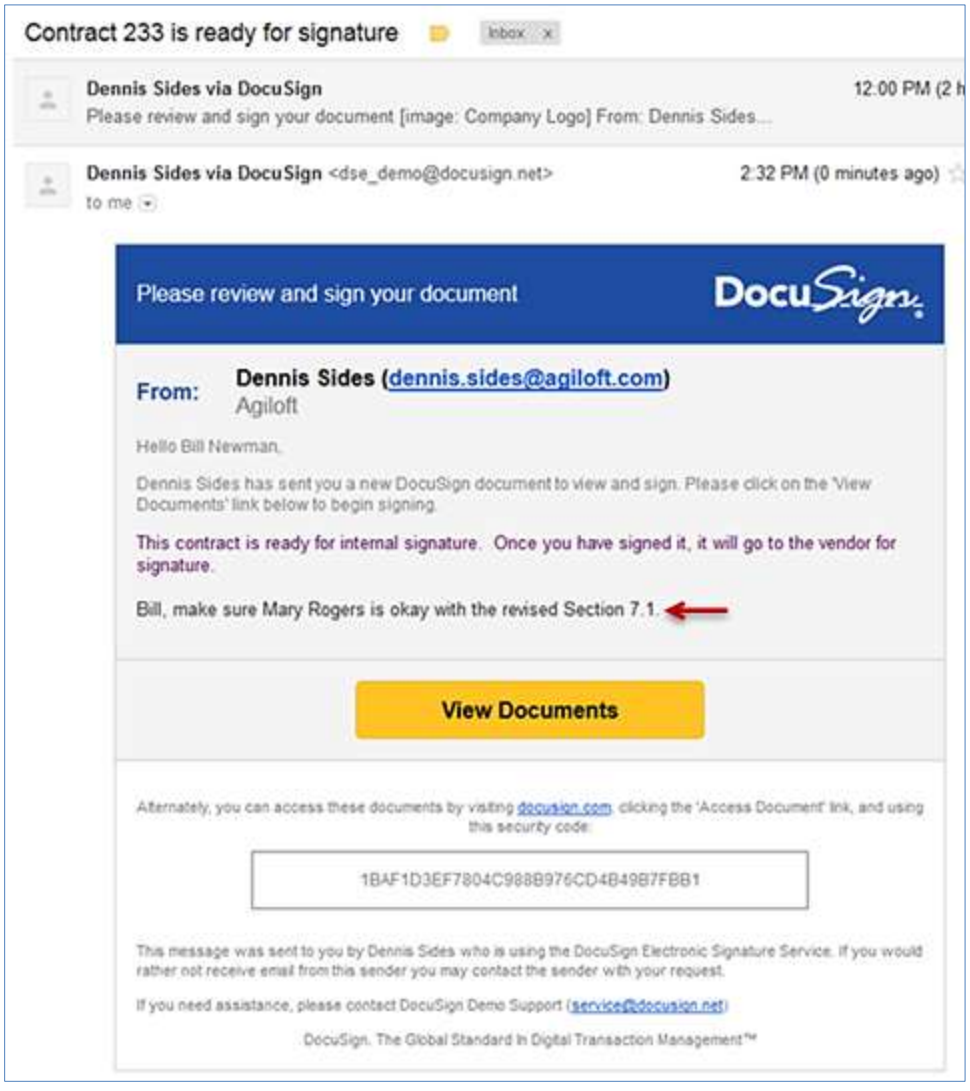

Contract 233 is ready for signature
Inbox
Dennis Sides via DocuSign
12:00 PM (2 h
Please review and sign your document [image: Company Logo] From: Dennis Sides...
Dennis Sides via DocuSign <dse_demo@docusign.net>
2:32 PM (0 minutes ago)
to me
Please review and sign your document
DocuSign
From:
Dennis Sides (dennis.sides@agiloft.com)
Agiloft
Hello Bill Newman,
Dennis Sides has sent you a new DocuSign document to view and sign. Please click on the 'View Documents' link below to begin signing.
This contract is ready for internal signature. Once you have signed it, it will go to the vendor for signature.
Bill, make sure Mary Rogers is okay with the revised Section 7.1.
View Documents
Alternately, you can access these documents by visiting docusign.com, clicking the 'Access Document' link, and using this security code:
1BAF1D3EF7804C988B976CD4B49B7FBB1
This message was sent to you by Dennis Sides who is using the DocuSign Electronic Signature Service. If you would rather not receive email from this sender you may contact the sender with your request.
If you need assistance, please contact DocuSign Demo Support (service@docusign.net)
DocuSign, The Global Standard in Digital Transaction Management™

Figure 40 - – Email Notification for Signer1

Note that the special email Message information that was entered on the Recipients screen for this signer appears in his notification email.

If an access code was assigned by the sender, then the signer will have to enter that code and click "Validate" before getting access to the document:

Please enter the access code to view the document
From:
Dennis Sides
Agiloft
The sender has requested you enter a secret access code prior to reviewing the document. You should have received an access code in a separate communication. Please enter the code and validate it in order to proceed to viewing the document.
Access Code
abc987
Validate
I never received an access code

Figure 41 - Signer Enters His Access Code

Next, the signer is asked to click a checkbox specifying that they "agree to do business electronically" with the sender. If the companies have conducted electronic business before through DocuSign, the message might read "I consent to use Electronic Records and Signatures." The screen is below:

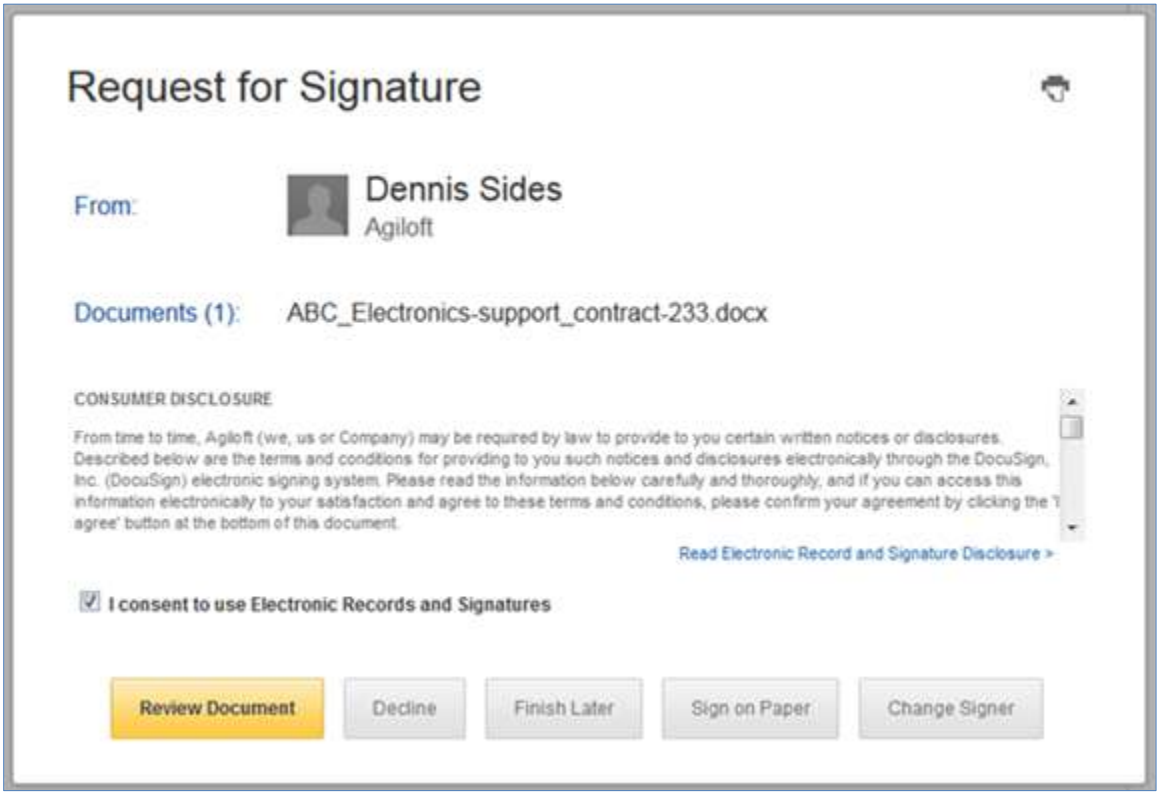

Request for Signature
From:
Dennis Sides
Agiloft
Documents (1):
ABC_Electronics-support_contract-233.docx
CONSUMER DISCLOSURE
From time to time, Agiloft (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through the DocuSign, Inc. (DocuSign) electronic signing system. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to these terms and conditions, please confirm your agreement by clicking the 'I agree' button at the bottom of this document.
Read Electronic Record and Signature Disclosure >
I consent to use Electronic Records and Signatures
Review Document
Decline
Finish Later
Sign on Paper
Change Signer

Figure 42 - Signer Agrees to Electronic Signing

The "Review Document" button does not become active until the consent box is checked.

Each email recipient (potential signer) has these options:

Review Document: Review, sign, and provide all requested information in the document.

Decline: Recipient is asked to provide the sender with a reason for declining to sign. This effectively ends the signing process, and notification emails are sent to the sender and all previous signers.

Finish Later: Recipient can return to the document anytime by clicking the email link.

Sign on Paper: Physically sign and then return the signed document by fax (there are some restrictions). See the DocuSign documentation for more information.

Change Signer: The document can be reassigned and sent to someone else for signature. A reason will also have to be provided (this option is controlled by permissions).

E-SIGNING THE DOCUMENT AT DOCUSIGN

When the "Review Document" button in Figure 42 above is clicked, the signer is taken into the document for review. Page number icons are displayed along the right for quickly navigating to areas of special interest. DocuSign should guide the signer through the process by highlighting in yellow those page numbers needing his/her attention.

Figure 43 below shows the document as James Martin would see it. He is the second signer and sees the first signer's signature, but he does not see any tags for subsequent signers:

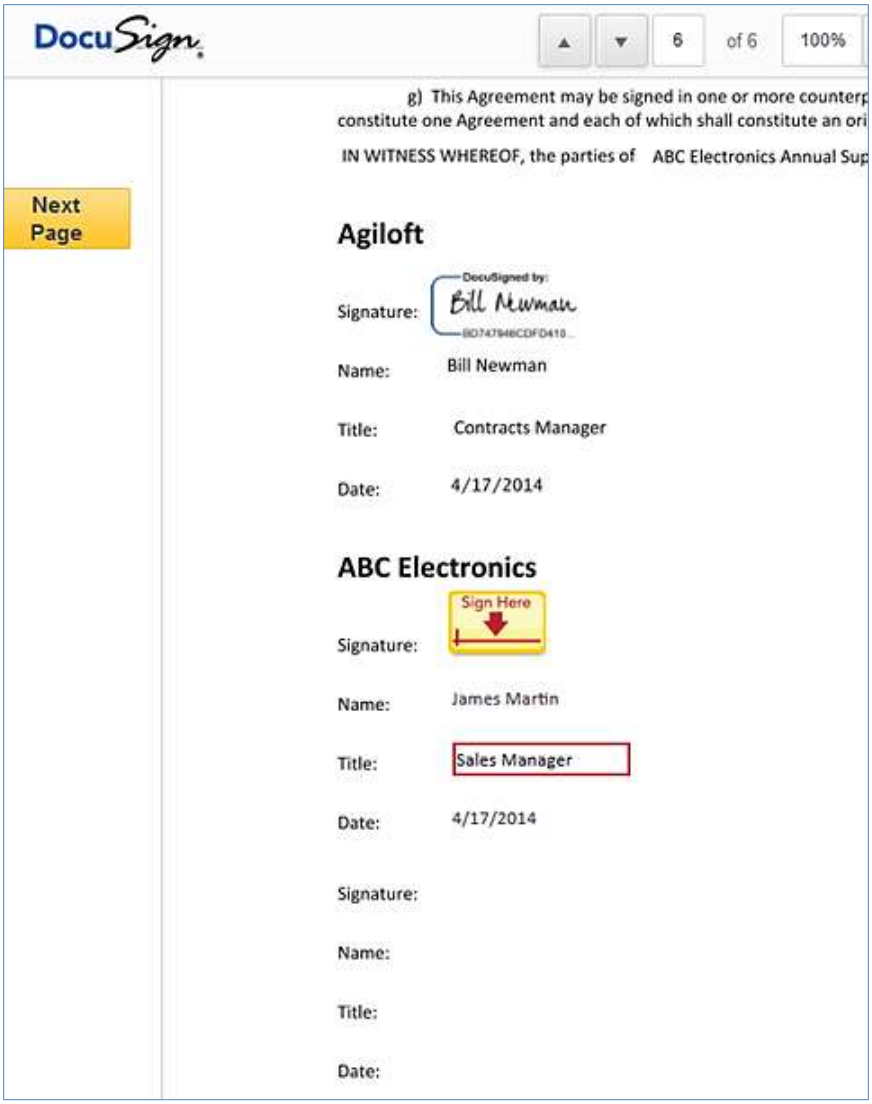


Figure 43 - Signing Block for Signer2

For a text box (like the red box next to “Title:”), the signer can type in a new title (which will be saved by DocuSign).

The first time a signer clicks on a “Sign Here” icon he/she will be asked to “Adopt Your Signature”:

Figure 44 - Choosing a Signature

The signer is given a choice of several DocuSign “signature styles.” You can also draw your signature using a mouse or your finger/stylus on touch screens. Note that your electronic signature does not need to look like your actual signature to be legal. If you do want your electronic signature to look like your actual signature, you can upload a scanned copy of your signature to DocuSign (see documentation).

The signer can also choose not to display the “DocuSigned by:” enclosure (DocuSign eSignature format) around the signature.

Once the signer has selected a signature, he/she will be requested to click “Adopt and Sign” or “Cancel”. After all the requested information fields have been completed (either automatically by the template or by typing it in), the signer will see a message saying “All required fields complete” and will be asked to click the yellow “Confirm Signing” button at the left:

Figure 45 - Confirm Signing

Once the signer clicks the "Confirm Signing" tab he/she will get an invitation from DocuSign to sign up for a free account (note that this is optional):

Think that was easy?
It's just as easy to sign any document electronically, even if it wasn't sent through DocuSign.
Sign up for a FREE account today!
Email
Password
Confirm Password
OR
By clicking the "Sign Up Now" button below, you agree to the Terms and Conditions
Download
Print

Figure 46 - Sign Up for a Free DocuSign Account?

Options available at Figure 46 above:

Get a free DocuSign account: Enter and confirm your password, then click “Sign Up Now”. Remember that signers don’t need to be registered at DocuSign, but senders do.

Download (lower right): Click to download a copy of the document. Note that the signing block area will be complete only up through the current signer.

Print (lower right): Click to print a copy of the document. Note that the signing block area will be complete only up through the current signer.

Exit: Click the “X” in the upper right hand corner to exit this window. You’ll be taken to a DocuSign “thank you” window that you can just close.

At this point the signer has completed his/her work and DocuSign will send a notification email to the next signer (if any) specified in the routing order.

After each signer has signed or after any other event which affects the status of the envelope, DocuSign sends a status update to the sender. This status is posted at both Agiloft and DocuSign.

Self E-Signing a Document at DocuSign

A signer can sign a document for which no tags have been preconfigured. This might happen several ways, for example, if the sender added the signer at DocuSign by modifying the envelope before sending out the document, without adjusting the document, or if a specified editor added a signer, etc.

In this case a signer might be presented with a screen like the following:

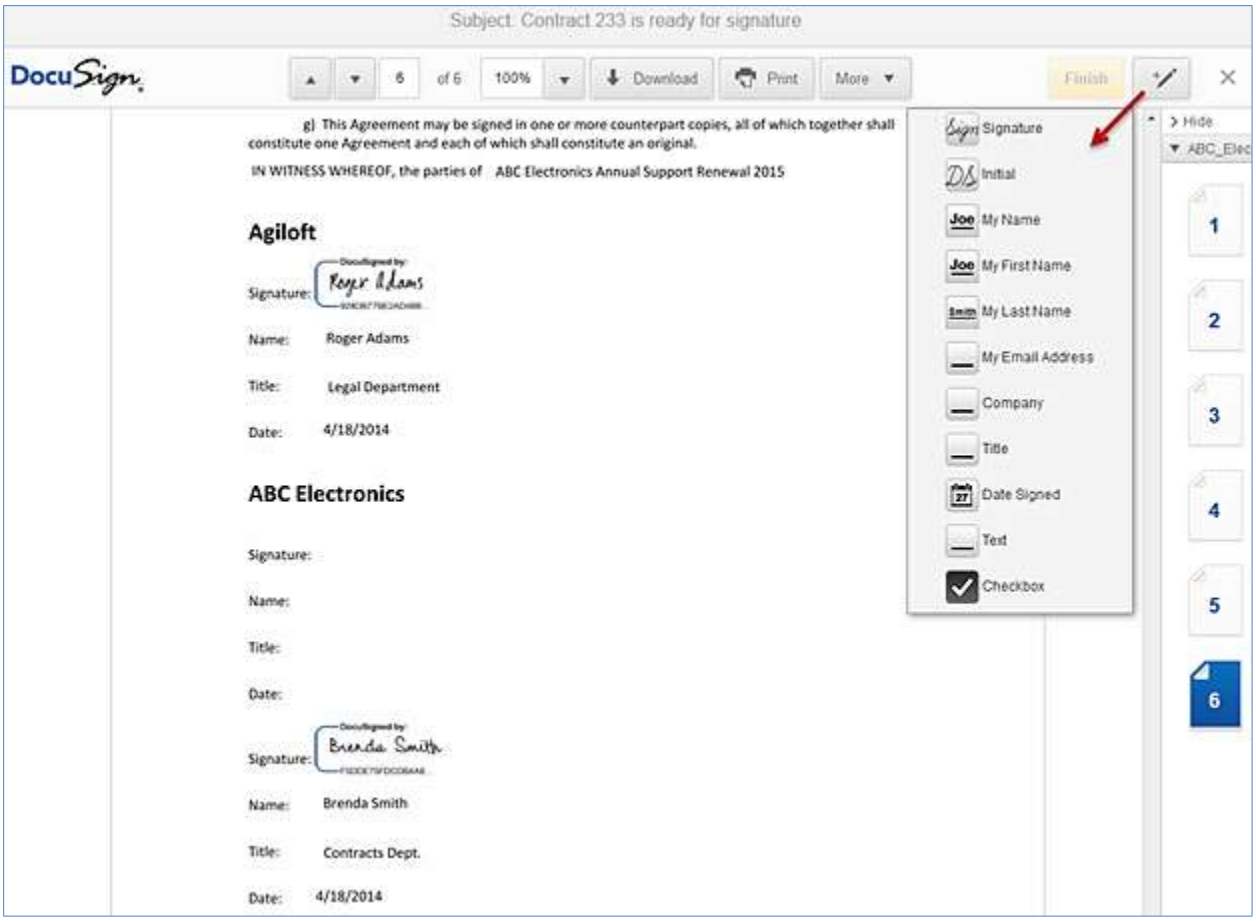


Figure 47 - Self E-Sign a Document

To create their own signing tags, the signer clicks on the tool tip icon at the upper right to see the list of available tags. (Under certain circumstances the signer may have to click the "More" dropdown and select "Correct" and choose "Edit Documents and Tags"). The signer selects a tag from the list, drags it to the desired location in the document, and then drops it. Tags can be repositioned by drag and drop, and/or resized by clicking on the resizing points:

Figure 48 - Resizing an Added Tag

The signer then types in their title, which DocuSign saves in its address book. When all the tags have been placed, the signer clicks the "Finish" button on the upper right. A popup window will ask "Are you finished signing your document? Yes/No." If "Yes" is clicked, DocuSign sends an email notification to the next signer, if any.

In summary, DocuSign treats the added signer like any other signer, but the signer must manually add his/her own signing tags.

Additional Functionality at DocuSign

Agiloft has implemented the basic functionality to get documents e-signed on DocuSign. The DocuSign website itself has additional options that an organization may want to investigate if their e-signing requirements are more complex.

The following sections touch on some additional DocuSign functionality.

For more information please consult these help resources on the main DocuSign website:

http://www.docusign.com/faq

http://www.docusign.com/support/downloads

http://www.docusign.com/sites/default/files/DocuSign_Service_User_Guide.pdf

http://www.docusign.com/sites/default/files/Account%20Administration%20Reference%20Guide.pdf

Account Features at DocuSign

There are many configurable features of your DocuSign account which the Account Administrator can view by clicking “Edit” from the “DocuSign ID Card” box on the home page (see Figure 1 and Figure 2), and then clicking “Features”.

The screen below only shows a portion of the many configurable options available.

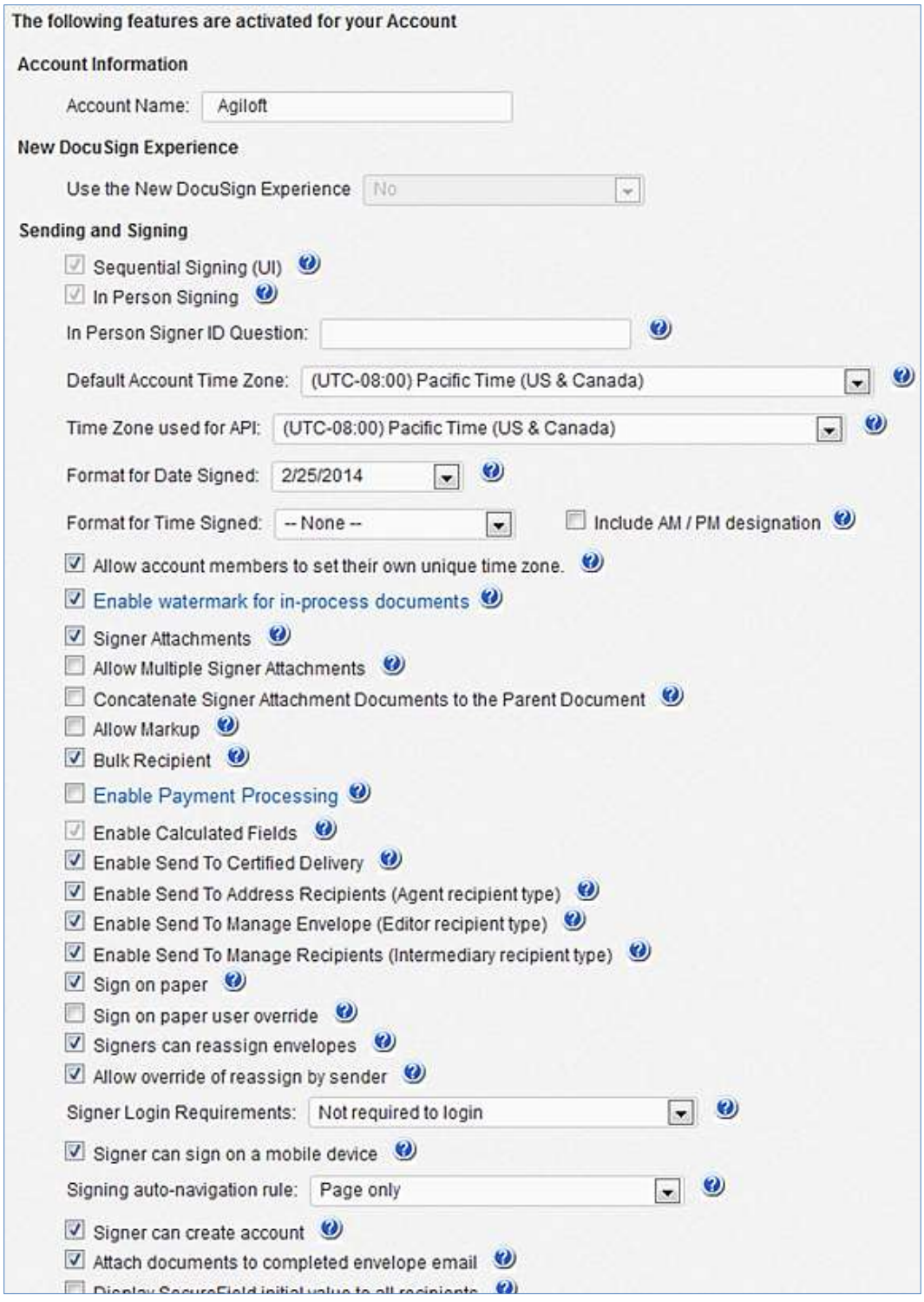

The following features are activated for your Account
Account Information
Account Name: Agiloft
New DocuSign Experience
Use the New DocuSign Experience No
Sending and Signing
Sequential Signing (UI)
In Person Signing
In Person Signer ID Question:
Default Account Time Zone: (UTC-08:00) Pacific Time (US & Canada)
Time Zone used for API: (UTC-08:00) Pacific Time (US & Canada)
Format for Date Signed: 2/25/2014
Format for Time Signed: -- None --
Include AM / PM designation
Allow account members to set their own unique time zone.
Enable watermark for in-process documents
Signer Attachments
Allow Multiple Signer Attachments
Concatenate Signer Attachment Documents to the Parent Document
Allow Markup
Bulk Recipient
Enable Payment Processing
Enable Calculated Fields
Enable Send To Certified Delivery
Enable Send To Address Recipients (Agent recipient type)
Enable Send To Manage Envelope (Editor recipient type)
Enable Send To Manage Recipients (Intermediary recipient type)
Sign on paper
Sign on paper user override
Signers can reassign envelopes
Allow override of reassign by sender
Signer Login Requirements: Not required to login
Signer can sign on a mobile device
Signing auto-navigation rule: Page only
Signer can create account
Attach documents to completed envelope email

Figure 49 - DocuSign Account Features

There is a very long list of configurable features in this display. Note that the DocuSign defaults should suffice for most users.

DASHBOARDS AT DOCUSIGN

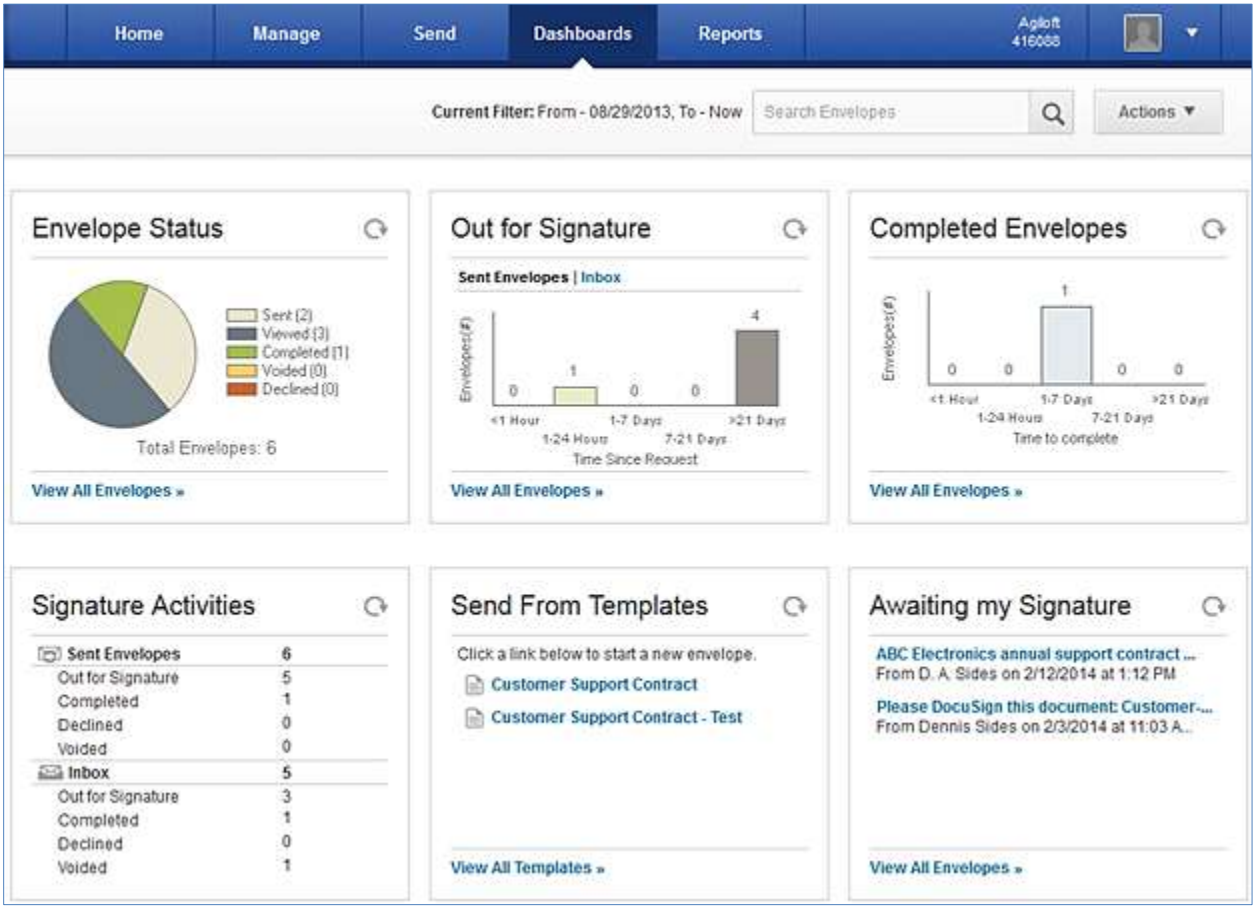


Figure 50 - Dashboards at DocuSign

Click the Dashboards tab at the top of the screen for a snapshot of your current activity.

EMAIL NOTIFICATIONS AT DOCUSIGN

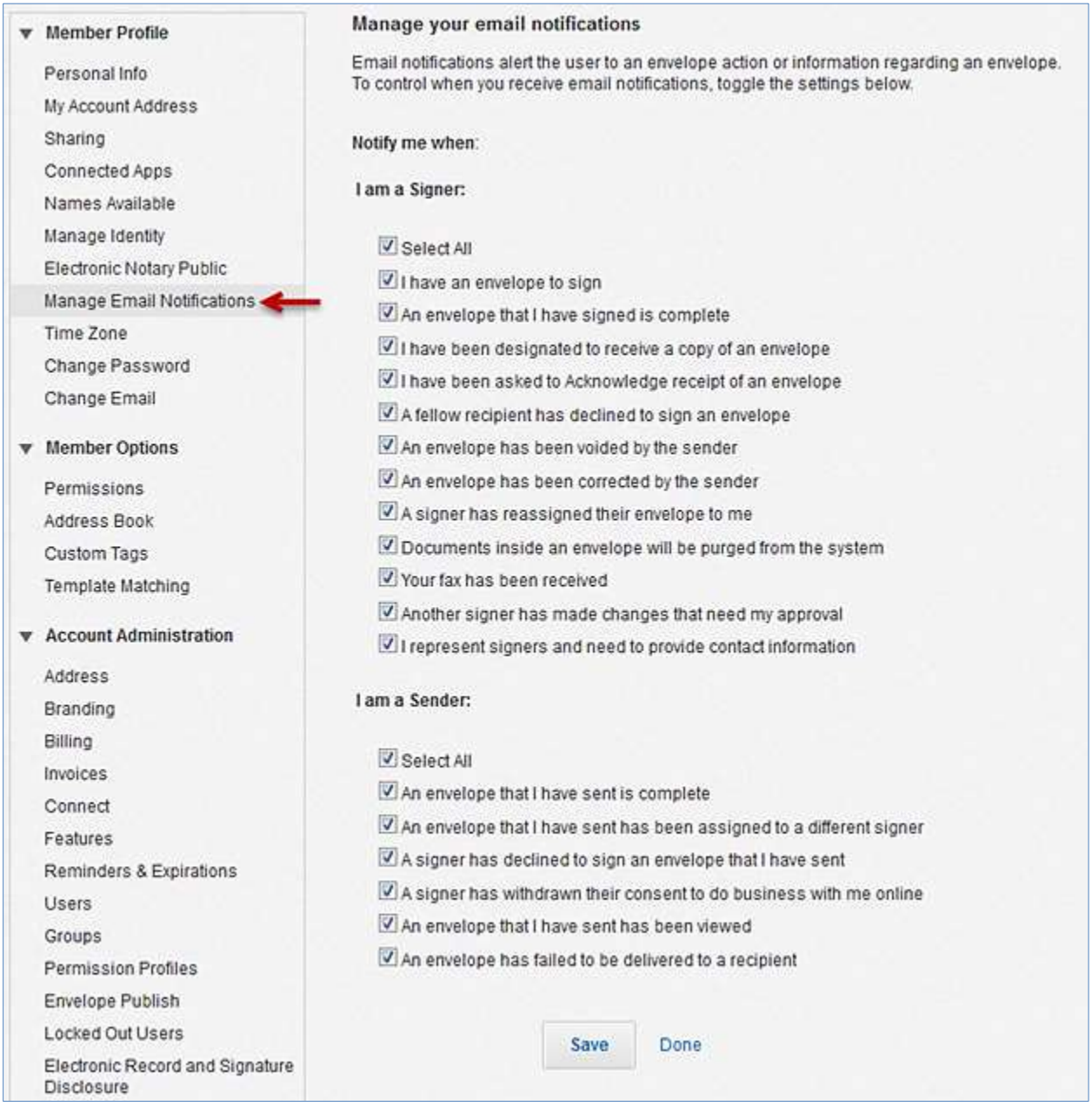

Member Profile
Personal Info
My Account Address
Sharing
Connected Apps
Names Available
Manage Identity
Electronic Notary Public
Manage Email Notifications
Time Zone
Change Password
Change Email
Member Options
Permissions
Address Book
Custom Tags
Template Matching
Account Administration
Address
Branding
Billing
Invoices
Connect
Features
Reminders & Expirations
Users
Groups
Permission Profiles
Envelope Publish
Locked Out Users
Electronic Record and Signature Disclosure
Manage your email notifications
Email notifications alert the user to an envelope action or information regarding an envelope. To control when you receive email notifications, toggle the settings below.
Notify me when:
I am a Signer:
Select All
I have an envelope to sign
An envelope that I have signed is complete
I have been designated to receive a copy of an envelope
I have been asked to Acknowledge receipt of an envelope
A fellow recipient has declined to sign an envelope
An envelope has been voided by the sender
An envelope has been corrected by the sender
A signer has reassigned their envelope to me
Documents inside an envelope will be purged from the system
Your fax has been received
Another signer has made changes that need my approval
I represent signers and need to provide contact information
I am a Sender:
Select All
An envelope that I have sent is complete
An envelope that I have sent has been assigned to a different signer
A signer has declined to sign an envelope that I have sent
A signer has withdrawn their consent to do business with me online
An envelope that I have sent has been viewed
An envelope has failed to be delivered to a recipient
Save
Done

Figure 51 - Manage Email Notifications at DocuSign

From the Home tab click the Edit link at the upper right corner of your DocuSign ID card (see Figure 1) to display the Administrator options. The default configuration (all boxes checked) should suffice for most users.

PERMISSIONS AT DOCUSIGN

Permissions can be set at DocuSign for user types and individual users. Please consult the DocuSign documentation for details.

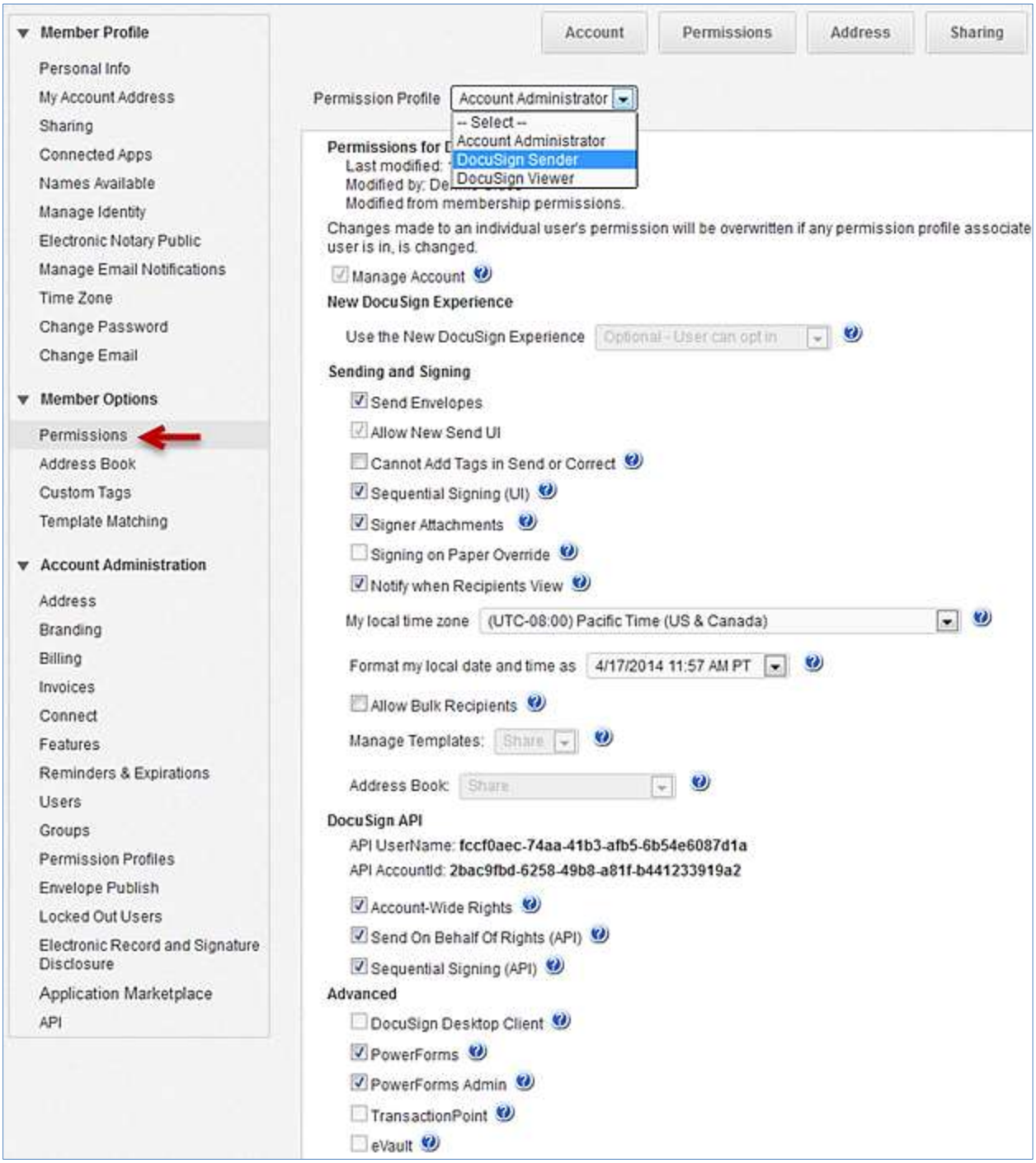


Figure 52 - Manage DocuSign Permissions

REPORTS AT DOCUSIGN

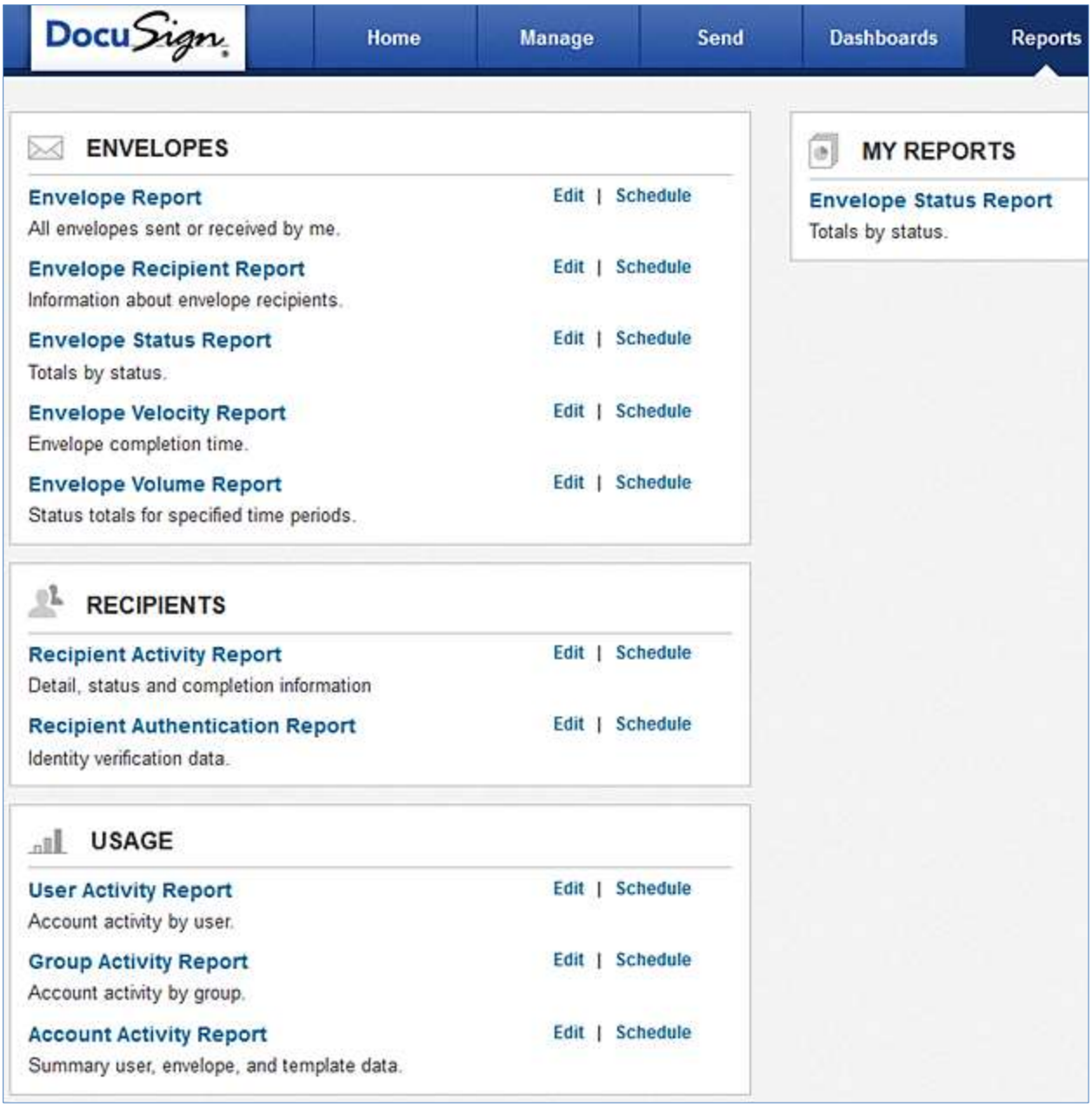


Figure 53 - DocuSign Reports

There are a number of reports available from the Reports tab that can provide more information about your account.

TEMPLATES AT DOCUSIGN

Some users may want to manage their electronic signing partially or completely from DocuSign itself, rather than from their Agiloft KnowledgeBase. This section will describe in general terms how that can be done. Note that in this case the KB will not have the "complete story" of the e-signing process.

Templates in Agiloft and templates in DocuSign are functionally the same in that they both create envelopes containing documents, signers, and routing information. The main difference is that signing tag icons are drag-and-dropped onto the document at DocuSign, and in Agiloft the $docusign:xxx metadata tags are embedded in the document which later get translated automatically into the signing tag icons at DocuSign.

For more detailed information on DocuSign templates please refer to:

http://www.docusign.com/sites/default/files/Quick%20Start%20-%20Creating%20a%20Template.pdf

To create a template at DocuSign see the template screenshot below (Figure 54):

1) Log on to your DocuSign account at https://docusign.net (note: you must be an administrator)
2) Click "Manage" then "Create" (at the upper left) and then "Template" in the dropdown
   To view existing templates, click "Manage," then "Templates", then click on desired template
3) Enter Template Name and Description
4) Upload the contract document(s) for the template envelope:
   If more than one document, you can specify the order in which the documents will display
   Note: recipients will see all of the envelope documents sequentially in one display
5) Assign the Recipients and Routing information:
   Enter Recipient Role (e.g., Signer 1) and click "Add Signer"
   For each signer enter Email Address, Name, Action (from dropdown), Identify (from dropdown)
   To change routing sequence, click and drag "grab bar" or re-enter "Order" number
   To verify routing sequence, click on "Order Diagram" for a graphical representation
6) Enter Email Subject, Message, and any individual notes to recipients
7) Click "Next" at lower right to enter document(s) to insert the signing tags
   Select the recipient from the dropdown under "Tag for:" at upper left
   For that recipient drag and drop the appropriate tags from the left pane onto the document(s)
8) When all recipients have been assigned tags, click "Save" at the lower left
   You can first select "Preview" to make sure all tags are correct for all recipients

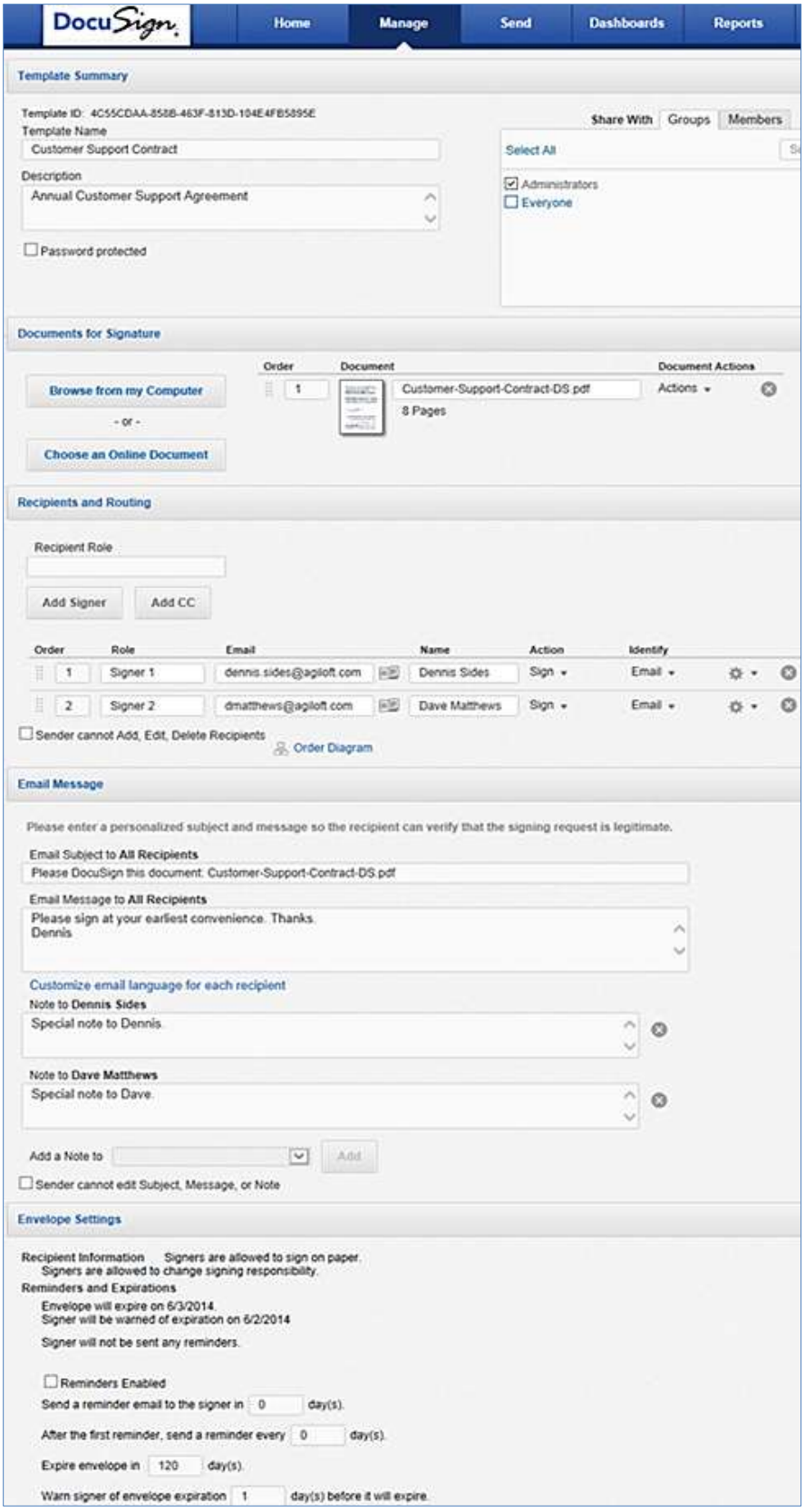


Figure 54 - Manage DocuSign Template Screen

To use a template to create an envelope at DocuSign (see screenshot above, Figure 54):

1) Log on to your DocuSign account at https://docusign.net (note: you must be a Sender); also see: https://www.docusign.com/support/how-to-guides/Creating-an-Envelope-using-a-Template)
2) Click “Send”, then click “Choose an Online Document”.
3) Click “My Templates”, and then click the desired template.
4) The template, as originally created, will be displayed (see above screenshot).
5) You can make changes here (i.e., add/change signers, change email message, etc.).
6) Click “Send Now” (or “Next” to preview the email/document, change tags, etc., before sending).
7) Recipients will receive (in signing order) emails requesting their e-signatures.

APPENDIX A – SAMPLE CONTRACTS FOR E-SIGNING

The best way to have a hassle-free user experience of the DocuSign Integration is for the administrator to prebuild standardized Print Templates in Agiloft with the necessary DocuSign tags. Once print templates for your various contract types have been created in Agiloft, the e-signing process becomes both simple and automated.

To assist you with your DocuSign setup, an abbreviated contract document is provided here. The next two pages will be the first and last pages (pages 1 and 6, respectively) of a sample Agiloft contract. The first page shows some standard "$" metadata tags and the next page shows the signing page for the contract, which was set up for one internal signer (Agiloft) and two external signers (ABC Electronics).

Note that the "$docusign:<type>:<field name>:<role name>" tags on this signing page are "invisible" (i.e., font color = white). All tags added to documents should be in white font, because the entries made by the Signers are simply placed "on top of" these tags. The tags are anchored to the location on the page where the data will be displayed, but they need to be invisible on the document. If the $docusign:xxx tags are visible in the document, they will remain visible after DocuSign has inserted their signing icons (e.g., "Sign Here", etc.)

The page after the example template shows that same signing page with the $docusign:xxx tags made "visible" (i.e., font color = black). You can also view any $docusign:xxx tag by selecting the tag area and then hovering over the "font color" icon as shown below:

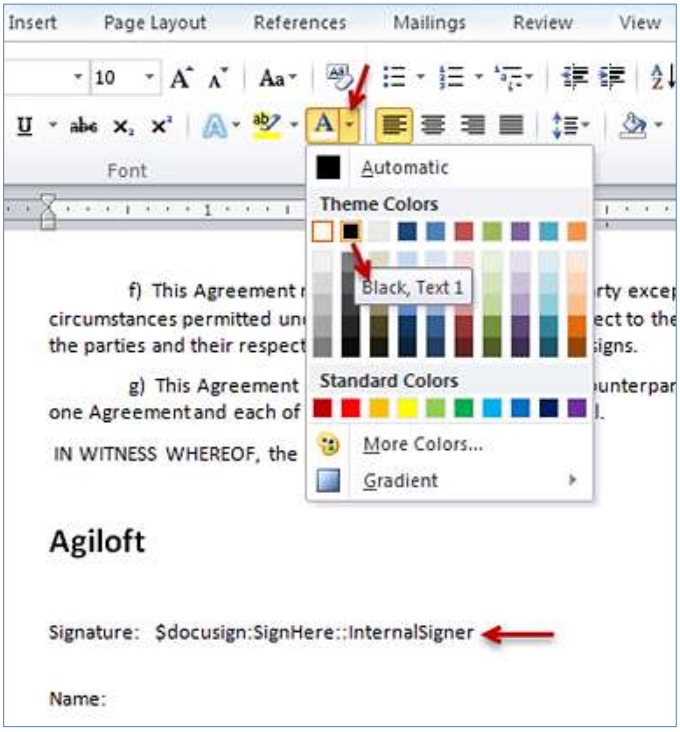


Figure 55 - Using Color to see Tags

Note that this two-page contract is an example only, and of course you can create any type of signing block(s) you wish.

AGILOFT CUSTOMER SUPPORT AGREEMENT – Sample

This Agreement is between Agiloft, Inc., a California Corporation, (“Provider”) whose principal place of business is 460 Seaport Court, Suite 200, Redwood City, CA, USA 94063 and $company_name, located at $street_address, $city, $state_province $zip_or_postal_code (“Customer”).

This Agreement supplements the End User License Agreement for Agiloft and hereby incorporates the limitations of liability and general provisions of that Agreement. The Customer has purchased the standard annual support/upgrade contract for its license of Agiloft.

1. INTRODUCTION

This Agreement covers standards for the provision of software support and upgrades by Provider to Customer, in connection with that End User License Agreement dated as of $contract_start_date between Customer and Provider (the "License Agreement"). This Agreement terminates on $contract_end_date, and may be renewed for additional twelve-month periods.

In accordance with the License Agreement, Provider has granted to Customer a license to use the Licensed Software (as defined in the License Agreement). Customer will operate the Licensed Software at its location in $city, $state_or_province (the "Customer Facility", which shall include any other location to which Customer may move its operations center in the future).

Customer has purchased licenses for both staff users (“Staff User”) (typically, technicians and other high-level employees) and end users (“End User”) (typically external customers and internal end users).

2. SUPPORT AND UPGRADE SERVICES

2.1 SCOPE OF SERVICES

a) The following are the Support and Upgrade Services that will be offered by Provider in connection with the Licensed Software:

Provider shall:

(i) develop and provide corrections, changes, or workarounds ("Corrections") for any defects, errors, or malfunctions in the Licensed Software (collectively, "Defects"), discovered by Customer or Provider, on a timely basis, given the nature and scope of the Defect;

(ii) provide to Customer all improvements, modifications and enhancements to the Licensed Software which Provider shall make from time to time and which Provider makes available to its Customers generally in the form of new releases; and

(iii) provide Customer with any upgrade releases ("Upgrade Releases") to the Licensed Software and all new Versions and Releases of the Licensed Software, which Provider makes available to its Customers generally; provided, however, that if any such Version or Release contains significant new or improved functionalities, Provider shall have the right to make such Version or Release available to Customer only upon the payment of additional license fees, or upon such other terms, as the Provider requires of its Customers generally therefor.

[Contract page 1 is above; (Contract pages 2-5 are deleted); Contract page 6 is below]

f) This Agreement may not be assigned by either party except in connection with and under the circumstances permitted under the License Agreement. Subject to the foregoing, this Agreement will be binding on the parties and their respective successors and permitted assigns.

g) This Agreement may be signed in one or more counterpart copies, all of which together shall constitute one Agreement and each of which shall constitute an original.

IN WITNESS WHEREOF, the parties of

Agiloft

Signature:

Name:

Title:

Date:

$company_name

Signature:

Name:

Title:

Date:

Signature:

Name:

Title:

Date:

[Contract signing page 6 above, with “invisible” tags]

[This is what should get sent to DocuSign]

[The same page with these tags made “visible” is below]

f) This Agreement may not be assigned by either party except in connection with and under the circumstances permitted under the License Agreement. Subject to the foregoing, this Agreement will be binding on the parties and their respective successors and permitted assigns.

g) This Agreement may be signed in one or more counterpart copies, all of which together shall constitute one Agreement and each of which shall constitute an original.

IN WITNESS WHEREOF, the parties of $docusign::contract_title:InternalSigner

Agiloft

Signature: $docusign:SignHere::InternalSigner

Name: $docusign:FullName:internal_signer_full_name:InternalSigner

Title: $docusign:Title::InternalSigner

Date: $docusign:DateSigned::InternalSigner

$company_name

Signature: $docusign:SignHere::Customer1

Name: $docusign:FullName:party1_signer_full_name:Customer1

Title: $docusign:Title::Customer1

Date: $docusign:DateSigned::Customer1

Signature: $docusign:SignHere::Customer2

Name: $docusign:FullName:party2_signer_full_name:Customer2

Title: $docusign:Title::Customer2

Date: $docusign:DateSigned::Customer2

[Contract page 6 above, shown with “visible” tags]

[Note: Do not send “visible” tags to DocuSign]

Appendix B - DocuSign Tables and Fields in Agiloft

Turning on the DocuSign extension creates several Tables, Fields, and Actions in Agiloft. If you manually deploy the DocuSign extension on an existing KB, you should see most of the new tables at the bottom of the left pane, as well as in other areas, such as the Contract layout and the DocuSign configure screen.

If you start from a KB that already has DocuSign deployed, the tables may be displayed in a different position.

- DocuSign Actions in the system are denoted with a prefix of ?, i.e. "?: Grant Access to DocuSign". Many of these actions cannot be edited by an admin user – they are hard coded.

This is a brief overview of the items that are added by the DocuSign deployment and their purpose:

DocuSign Users Table

Purpose: This table needs to have a record for each Agiloft user who will be sending documents to DocuSign (by creating the Envelope and clicking the Send button). Each record must have a valid DocuSign login to enable the sending.

Automation

There are two rules running on this table that run actions to add or remove the Agiloft DocuSign User to/from the list of valid Users in the linked DocuSign Account.

These rules should not be touched.

DocuSign Roles

Purpose: This table is used to name the Roles that will be assigned to Signers and people identified as Recipients in the DocuSign Action to create the Envelope. It has been prepopulated with four roles:

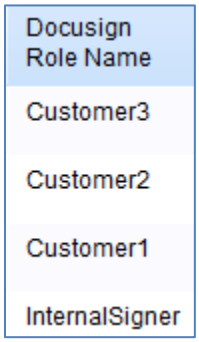


Figure 56 - Default Roles

In the DocuSign Action Wizard, when choosing the recipients, the admin selects from this list for each recipient. The role name is used in the DocuSign tags that are added to the document to match a Signer to his role, and the role names must match exactly.

New roles may be added as needed and applied to the Signers and the Document tags.

DocuSign Envelopes

Purpose: This table holds the DocuSign Envelopes, which contain a link back to the Contract from which they were created, an embedded table of the DocuSign Recipients, and a field with the attached files that will be sent to DocuSign to be reviewed/signed.

A DocuSign Envelope is created when a user clicks an action button that runs a "DocuSign Action". By default, a button called "Create DocuSign Envelope" is added to the Contracts table on the DocuSign Envelopes Tab (added to the layout during the deployment).

How the envelope and recipients are populated depends on the configuration of the Action run by the button, and it may be changed by updating the Action.

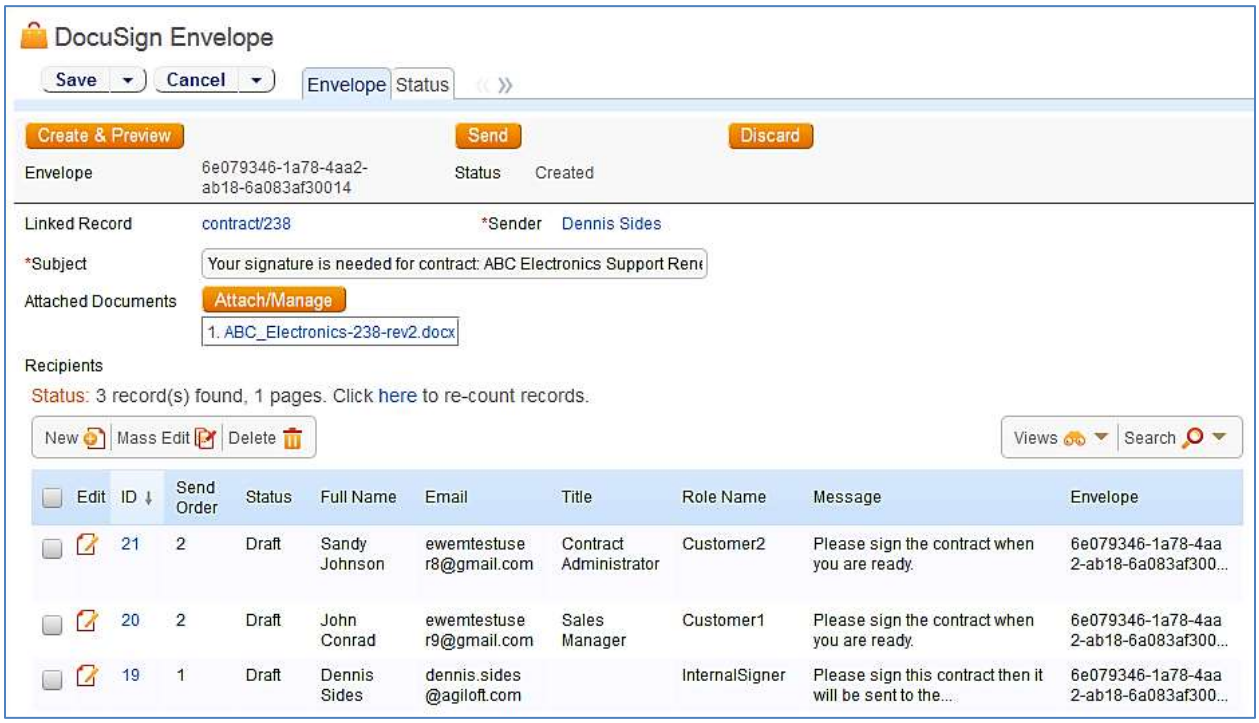


Figure 57 - DocuSign Envelope Screen

The Status of the Envelope is updated automatically based on progress at DocuSign. Once it has been sent to DocuSign, it will have a Status of Created and will show the Envelope ID at DocuSign. As each Recipient signs, the Status of the Recipient record will be updated to show as Completed.

More details on working with the Envelope are provided in the section: "Create a DocuSign Envelope".

Automation

If using a system that was pre-deployed with DocuSign enabled, this table will have a rule that updates the linked Contract when the Envelope Status changes to Completed. The rule sets the Status of the linked Contract to Signed and maps the Signed Document files to Document records that are linked to the Contract.

DocuSign Recipients

Purpose: This table holds the Recipients for a particular DocuSign Envelope. They are linked to the Envelope and to the Contract from which the Envelope was generated. The Recipient records are created automatically based on the configuration of the DocuSign Action that generates the Envelope record.

However, Recipients can also be added manually to a DocuSign Envelope if needed.

The Recipient Send Order controls the order in which Signatures are requested by DocuSign and each Recipient should have a different Role Name for a given contract.

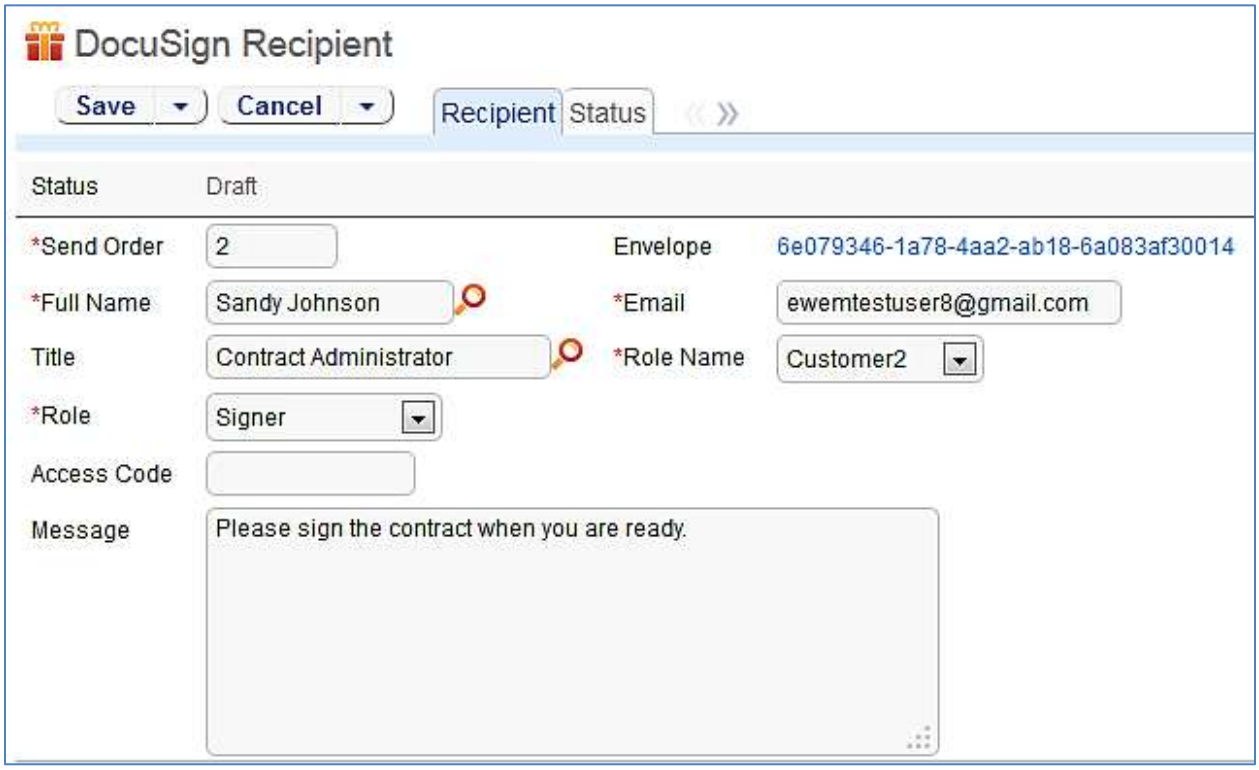


Figure 58 - DocuSign Recipient Screen

The DocuSign Envelope and Recipients tables are usually accessed from within the Contract.

Changes to the Contracts Table

When DocuSign is first deployed, several fields and a new tab are added to the Contracts Table.

The fields added include three linked sets of fields for the signers: Internal Signer, 1st Party Signer and 2nd Party Signer, along with their email, title, and so on. These fields are linked to the People table, but they do not require a source record, that is, they allow you to type a new name, email, title and so on into the field for a given Contract.

The Action button is added to Create DocuSign Envelope.

The related tables of DocuSign Envelopes and DocuSign Recipients are also added to the layout on the new Tab, which is called DocuSign Envelopes:

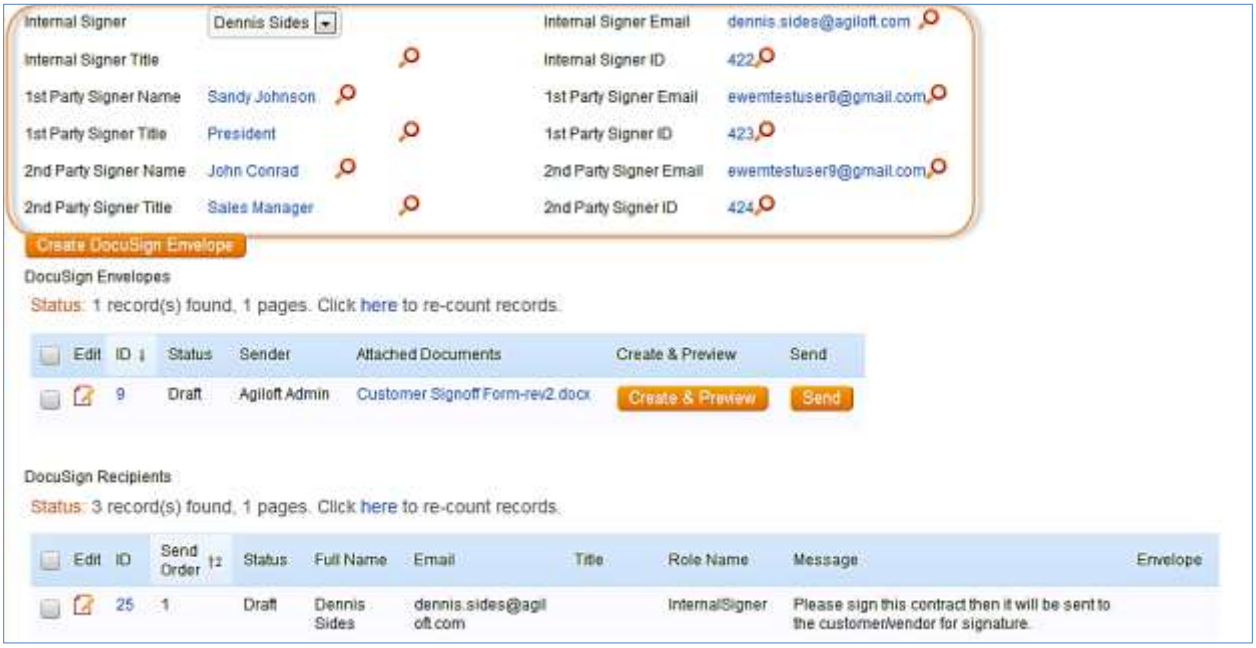


Figure 59 - New Signer Fields

When deploying DocuSign manually on an older KB, only the Admin group has view permissions for the new tables and fields. Permissions will need to be manually added for other user groups.

When starting from a KB where DocuSign has been pre-enabled, the DocuSign-specific tables and fields will be visible by default to a new group called DocuSign User. This way they will not get in the way of other users until you decide you want to finish setting up and start using the DocuSign integration.

In this case, even the admin group may not see all fields on the layout and will not see the tables in the left pane. To quickly "turn on" all elements, simply edit the admin user and add the DocuSign User group to his Groups field.